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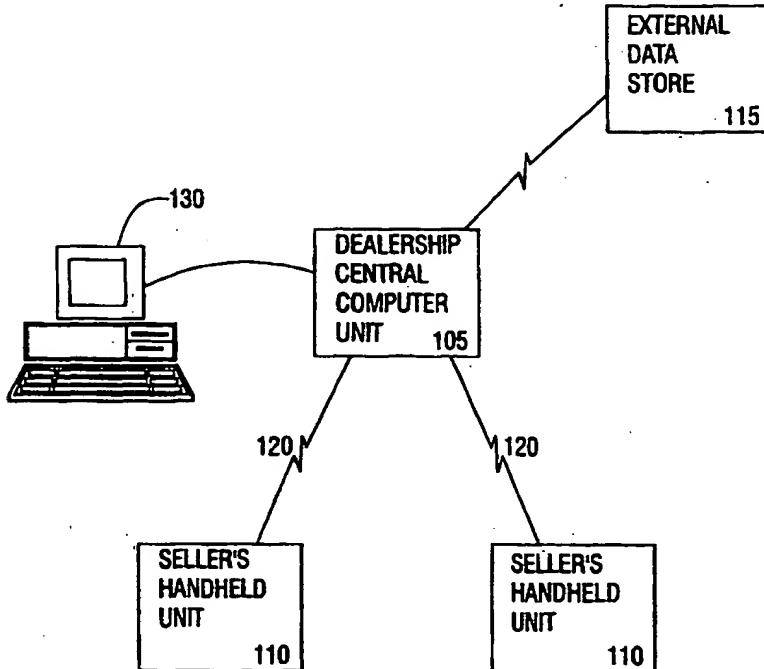
## INTERNATIONAL APPLICATION PUBLISHED UNDER THE PATENT COOPERATION TREATY (PCT)

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(54) Title: PORTABLE SALES PRESENTATION SYSTEM WITH SELECTIVE SCRIPTED SELLER PROMPTS

## (57) Abstract

A handheld computer unit for use by, e.g., a car sales person (seller) prompts the seller with a standard script to be followed at each step in the process after a prospect enters a dealership. The prospect's response to the scripted questions is used to identify the prospect's particular interests of a general nature, e.g., safety, and of a specific nature, e.g., trailer towing capacity. When either a general or specific interest is identified, the seller is prompted to tailor the conversation to address the prospect's interests. Among other things, the handheld unit can perform functions such as (i) permitting the seller to retrieve useful information such as inventory availability from a sales information data store; (ii) displaying option-sensitive prompts to aid the seller in discussing specific vehicles under consideration; (iii) accessing remote communications links to external data sources to obtain information on credit-worthiness of the prospect, financing terms, and availability; (iv) displaying motivational information such as the percentage likelihood of consummating the sale successfully; (v) providing a communications link with management personnel.



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PORTABLE SALES PRESENTATION SYSTEM  
WITH SELECTIVE SCRIPTED SELLER PROMPTS

**1. BACKGROUND OF THE INVENTION**

**1.1 Cross-Reference to Related Application**

5 This application is a continuation in part of co-pending "parent" application Serial No. 08/587,276, filed January 18, 1996, which is incorporated by reference in its entirety.

**1.2 Source Code Appendix**

10 The microfiche appendix filed herewith contains computer-program source code and database information for an illustrative implementation of the invention. The source code is copyrighted and is the property of the assignee of this application. Authorization is granted to make copies of the source code in conjunction with making facsimiles of this application and any patent(s) issuing thereon, but all other rights are reserved.

15 **1.3 Introduction**

The cost of any goods or services that are sold include costs of marketing. Every item (tangible or intangible) that is sold has included in its costs, the costs of "selling" it. Millions of people are employed in "selling" and hundreds of millions of man-hours are expended in direct face-to-face "selling" every year in the United States. The cost of "selling" is every bit as real a 20 part of the cost of an item or service as is the direct labor cost involved in manufacturing the item or providing the service.

It is generally estimated that less than 10 percent of a salesperson's total time is spent actually "selling" — i.e. the direct face-to-face contact with a prospective buyer. Therefore the efficiency of the face-to-face sales process is directly related to the quality with which the face-25 to-face contact is carried out.

The present invention relates to a computer system that addresses some common information-flow problems in a large "industry," namely the sales process. The computer system organizes specific information to assist salesmen or saleswomen (referred to generically as "sellers") and management in making a presentation to a potential purchaser ("prospect"), in a 30 methodical and consistent manner. Use of the system by a seller produces a number of practical

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benefits, including a more effective matching of the prospect's needs to one or more specific products or services to the needs of the prospect, as well as faster determination of appropriate financing arrangements. This in turn results in a more satisfactory experience for the prospect and better on-the-job training for an inexperienced seller, both of which lead to more effective utilization of capital by the seller or his or her employer.

In a nutshell, the computer system reduces costs associated with selling, resulting in exactly the same benefits — lower cost and more effective utilization of capital — as systems which reduce costs associated with research, development, design, manufacturing, maintenance, etc.

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#### **1.4 Human-Factors Problems in Large-Volume Sales Organizations**

The sales process can be usefully thought of as an interaction between a prospect and a seller. When performed correctly, the process comprises a logical series of exchanges of information between the seller and the prospect, between the seller and management, between management and a credit bureau, etc. The actual steps will vary depending upon the type of product and the industry, but the concept of the sales process being a sequence of definable information exchanges remains the same.

Historically, however, the actual process of selling, when done on a large scale, has been a disorganized one. Some people are thought of as "born sellers" and need little training to be effective. With suitable training, many other individuals can learn the sales process and achieve good results. In large sales organizations such as car dealerships, however, turnover is frequently high. As a result, it is often not possible to count on having a population of sellers who all either are born sellers or have had suitable training. That means that variations in natural ability and training lead to what amounts to inefficiencies of scale, with a concomitant reduction in productivity.

Such inefficiencies are not inherent to large-scale sales. A significant weakness of selling on a large scale is the inability to enforce a certain measure of standardization of the sales process on large numbers of sellers so that they consistently utilize proven sales techniques.

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Sales efficiency (defined here as the ratio between sales consummated to prospective buyers dealt with) improves dramatically when sellers record sufficiently complete data on sales prospects to achieve other goals, such as follow-up communication by phone or mail with those prospects that did not make a purchase, correct determination of closing ratios for each individual seller, or analysis of the advertising source that initially captured the prospect's attention.

Inefficient sellers can be given additional training or, if necessary, weeded out when correct determination of sales efficiency ratios for individual sellers can be made accurately, quickly, and with reduced overhead. Advertising efficiency (defined here as the ratio of advertising dollars spent to the gross sales volume produced) is enhanced by analyzing the advertising sources that initially capture prospect attention.

An illustration of the need for such a system can be seen in a car dealership, an area in which very large dollar volume sales occur and the sales process is sometimes poorly administered. In general, dealerships have several characteristics in common:

1. Due to less-than-perfect (or even virtually non-existent) pre-employment screening, dealerships may hire sellers that lack true sales proficiency, a problem in most types of retail sales operations.

2. Due to long hours, Saturday work days, and a poor industry image, car dealerships may suffer from high levels of personnel turnover, particularly in the sales departments (in which 100%+ turnover per year is not uncommon).

3. Due to turnover, dealerships are faced with a constant re-training need, which in some cases is poorly accomplished.

4. Many dealerships hire experienced sellers from other dealerships on the assumption that they are good at what they do and do not require training, when in fact these experienced sellers may use very poor sales techniques.

5. Many dealerships refrain from hiring new, inexperienced sellers because they do not want to make an investment in training or suffer loss of productivity as a new seller comes up to speed.

6. Ironically, dealerships do not want to invest in sales training precisely because turnover is high and the investment would be "wasted" in their view. This tends to produce high failure rates among new sellers.

### 5 1.5 Prior Attempts at Standardizing the Sales Process

A scattered few vehicle manufacturers (e.g., Lexus, Infiniti, and Saturn) have spent large amounts of time and money attempting to improve the quality and consistency of procedures to control the sales process. Dealerships that exert control over the vehicle sales process have in general been far more successful than those that have not. Many of these dealerships have elaborate pencil and paper control procedures. Some employ computerized systems, but as far as is known they record data only after the fact.

### 10 1.6 Long-Felt Need

Despite the modest success of these procedures, direct real-time supervision of the sales process has long been recognized as difficult. To be effective, such supervision must take place where the sales presentations are made, i.e., in changing physical locations throughout the dealership, not at a desk or counter where a supervisor can observe. A sales manager's presence during the conversations between the seller and the prospect, however, is likely to undermine the rapport-building that can be critical to the success of the sales process.

15 The problem is exacerbated by the need for ready communication between the seller and his or her manager, or "control desk." Thus, the need for direct managerial supervision is simultaneously created and made more difficult by the nature of the business. The need is highlighted by the fact that, because considerable advertising dollars are invested in attracting new business to the dealership, each prospect that is handled less than optimally may represent a 20 substantial lost profit opportunity.

## 25 2. SUMMARY OF THE INVENTION

A computer system in accordance with the present invention addresses many of these problems, including improvement, standardization, and enforcement of the sales process;

efficient training of new sellers; and real-time control of the process by management. The system comprises one or more handheld computer units used by sellers that may be linked with a central computer unit. Each dealership decides the exact sequence that it would like its sellers to follow. The handheld unit then prompts the seller with a standard script to be followed at each 5 step in the process after a prospect enters the dealership. The prospect's responses to the scripted questions are used to identify the prospect's motivation (e.g., safety) or specific interest (e.g., trailer towing capacity). Software switches can be used to indicate motivations or specific interests. The switches are monitored during the sales presentation. When a motivation or interest is identified, the handheld unit prompts the seller to introduce information corresponding 10 to the identified interest.

### **3. BRIEF DESCRIPTION OF THE DRAWINGS**

Figure 1 is a block diagram of a system in accordance with the invention.

Figure 2 is a perspective view of a specific embodiment of a handheld unit in accordance 15 with the invention.

Figures 3 through 21 are screen prints of illustrative screen displays created on a handheld unit by a specific implementation of software in accordance with the invention. The screen displays, discussed in more detail below, implement the invention for a car dealership.

Figures 22 through 70 are illustrative scripts used in a specific implementation of the 20 invention for a car dealership. The organization of the scripts is discussed below.

### **4. DETAILED DESCRIPTION OF SPECIFIC EMBODIMENTS**

#### **4.1 Overview of Illustrative Embodiment**

One illustrative embodiment of the invention takes the form of a system for enforcing 25 recording, by a seller, of information about a vehicle-purchase prospect at an automobile dealership. In the interest of clarity, not all features of an actual implementation are necessarily described in this specification, although many additional details of such an implementation can be found in the microfiche appendix. It will of course be appreciated that in the development of any such actual implementation (as in any computer-system development project), numerous

engineering and programming decisions must be made to achieve the developers' specific goals and subgoals (e.g., compliance with system- and business-related constraints), which will vary from one implementation to another. Moreover, attention will necessarily be paid to proper programming practices for the environment in question. It will be appreciated that such a development effort might be complex and time-consuming, but would nevertheless be a routine undertaking of system development for those of ordinary skill having the benefit of this disclosure.

As shown in Figure 1, at its most basic, the illustrative system comprises one or more seller computer units 110 operated by sellers and may also include a central computer 105. The seller computer unit 110 may be of a size suitable to held in a seller's hand, referred to simply as a "handheld" unit, although it may be held in the seller's hand, used on a table or on the seller's lap, suspended from a strap around the seller's neck, etc. The illustrative examples discussed below all involve such handheld units. Alternatively, the seller computer unit 110 may comprise a fixed unit, e.g., a desktop computer with suitable programming.

The handheld computer unit 110 manages a sales-information data store, utilizing any convenient database management system (DBMS) software. This sales-information data store may also be located on the central computer. The external data store(s) are remotely located at places such as vehicle manufacturers, credit bureaus, and credit granting institutions on their computer systems 115.

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#### 4.2 The Sales-Information Data Store

The sales-information data store, which may be maintained at or by the handheld computer unit 110, or at the central computer 105, or both, includes a number of specific databases. Virtually any of the databases referred to herein can be either local databases on the handheld unit (updated periodically from a central computer or other data store, e.g., via a serial or parallel cable, a network connection, a radio link, or an infrared link) or remote databases located on the central computer, accessed through a conventional disk search or through an on-line query. Some or all of the databases may be combined if desired into a single complex

database, as will be recognized by those of ordinary skill having the benefit of this disclosure.

The databases include:

(1) a vehicle-inventory information database, which can include both a dealer's database as well as those vehicles in the inventory of other dealerships in a commonly owned group of dealerships. Inventory information is valuable when the seller cannot locate the particular item sought by the prospect;

(2) a customer database, containing conventional information about customers who have made purchases, enabling the seller to identify a prospect as a valuable repeat customer if one should return to the dealership;

(3) a prospect database, likewise containing similar information about prospects who have visited the dealership. With this information, management can determine if there is a pattern in the point at which sales processes are breaking down, or whether a certain seller suffers from very poor sales efficiency. Very importantly by interrogating this database a prospect can be identified as a returning prospect. A returning prospect, known in the auto industry as a "be-back" prospect, has a percentage likelihood of successful consummation of sale that is easily triple that of a prospect on a first time visit. The reason for this is that a "be-back" prospect has completed his or her shopping process and is now ready to make a purchase. For this reason a "be-back" prospect is especially valuable and deserves special attention. Further, the availability of such information saves the time involved in re-entry of data if the prospect returns to the dealership at a later date;

(4) a pending-transaction database, referred to colloquially herein as a "deal" database. Typically a record is started in the pending-transaction database when the first actual offer is made to or by the prospect. Stored information on pending transactions allows managers to monitor sales transactions as they are taking place, enabling them to insert themselves into the sales process if a deal begins to turn sour; and

(5) control-record information, which can provide, for example: data on financing and leasing plans; data on taxes and fees that would apply to the particular sale; information on other products or services frequently sold in conjunction with the desired purchase item,

information on commission rates that apply to various components of the sale, or the sequence and content of each step in the sales process.

#### 4.3 External Data Stores

Useful information may be contained within databases at one or more external data stores such as manufacturers, credit bureaus, and credit-granting institutions. For example, vehicle manufacturers commonly maintain real-time updated databases of vehicles on order, in production, in transit, and in the inventories of all dealerships nationwide. When a situation is encountered where the dealership does not have on hand the vehicle that the prospect desires, the seller can access this external data store from a handheld computer to see if a suitable unit exists somewhere in the distribution system.

These external data stores may be accessed directly from the handheld unit or through the communications network to the central computer that has a conventional modem attachment to the telephone network to the vehicle manufacturer.

#### 4.4 The Hand-Held Computer Unit

The handheld computer unit 110, referred to as a handheld unit, may be a custom-designed unit or a suitably programmed subnotebook computer or personal digital assistant (PDA). It may be a stand-alone unit; or it may be designed for use as a smart wireless terminal in a larger system including a central computer unit 105; or it may be designed to operate in either stand-alone or smart-terminal mode at the user's option.

A) WIRELESS LINK 120: The handheld unit 110 may have a conventional communications interface or link 120 to the central computer unit 105 or to other handheld unit(s) 110, preferably a wireless link 120 to enable user mobility. The wireless link 120 may take the form of, e.g., a radio modem, an infrared beam, or similar devices.

B) INPUT DEVICE: The handheld unit 110 has a conventional input device operable by the seller for recording data about the prospect, along with suitable conventional programming for managing the input process. The input device may take the form of, e.g., a keyboard; a touchscreen such as those found on many PDAs; a pointing device such as a mouse, trackball, or

J-stick; or a voice-recognition unit. The input device may also have an audio recording input capability.

5 c) TRANSMISSION OF PROSPECT DATA: The handheld unit 110 may include programming for transmitting prospect data to the central computer unit 105 or to other handheld units 110 via the communications link. The prospect data may be transmitted to the central computer unit 105, but may also be retained locally at the handheld unit 110.

10 d) SALES INFORMATION REQUESTS: The handheld unit 110 includes programming for interrogating the sales-information data store to obtain information requested by the seller. This may include, e.g., inventory information to determine which cars are in stock or can be obtained quickly.

15 e) DISPLAY: The handheld unit 110 includes a conventional display (e.g., an LCD display) and suitable programming for displaying requested sales information to the seller. As noted above, display of the requested information may be contingent on the seller having entered all required prospect data and complying with steps in the sales communications process that is required by sales management.

20 f) LOCAL DATA STORE: The handheld unit 110 may include a local data store (e.g., read-write memory or "RAM," flash memory, or a hard disk drive) for locally storing some or all of the sales information data store. This permits the handheld unit 110 to operate independently of the central computer unit 105 if desired, advantageously reducing wireless communications traffic and permitting use of the handheld unit 110 if the central computer or wireless communications link are inoperable.

25 g) EXTERNAL DATA STORE: The handheld unit 110 may access databases at external locations such as the external data store 115 via direct communications or by communications over the wireless link 120 to a central computer 105, which has a conventional communications link over telephone lines to the external data store. The communications link may be a modem-type link or a direct digital connection, e.g., an IDSN line, a T1 or T3 line, etc.

#### 4.5 Sales Communication Process

A) SPECIFIED SEQUENCE: The handheld unit 110 includes programming to prompt the seller to perform a specified sequence of steps in a desired sales communication process. The programming may take the form of pre-stored scripts, in a suitable macro-like script language, that are conventionally interpreted by an interpreter (or alternatively are conventionally compiled into executable form) and which, when executed by the handheld unit 110, cause the handheld unit 110 to display appropriate messages on a display.

Different scripts may be used for different sales contexts. For example, a script for an in-person visit by a prospect may prompt the seller to handle the encounter differently than for a telephone inquiry.

The sales communications process(es), and thus the script(s), will normally include obtaining prospect data and recording it in a data store in the handheld unit 110; the scripts preferably take into account the prospect data as it is entered by the seller. For example, if the initial prospect data entered by the seller indicates that the prospect is young, then the programming script may prompt the seller to ask whether the prospect would be interested in a first-time-buyer financing package and to record that prospect data.

B) PRODUCT PRESENTATIONS: The handheld unit 110 may include programming to display a series of scripted product features and benefits. These scripts may vary based upon the particular product that the prospect is interested in. A comprehensive product presentation is key element of a successful sales process.

C) RECORDING OF DATA: For greater usefulness of the system, the seller is asked to record the prospect's personal information such as name, address, etc., early in their meeting. As the seller records the information into the handheld unit 110, the information may be conventionally transmitted (on a real-time basis or periodically in a batch) to other handheld units 110 or to the central computer unit 105 for storage in the appropriate database for use in a conventional sales prospect follow-up system. Thus, no matter how the sales transaction ends, the dealership will always have a record of the prospect's visit and can follow-up the visit with a letter or phone call.

Human factors are a disincentive to comply with recording of prospect data: Since sellers are evaluated on their sales efficiency, they have a disincentive to record data on prospects that do not purchase since this would reflect negatively on their sales efficiency ratios. Historically for this reason sellers in this situation have done a very poor job of collecting 5 prospect data in spite of its obvious usefulness to the dealership.

D) INCENTIVES TO COMPLY WITH SALES PROCESS: Notably, the sales-information-request programming of the handheld unit 110 includes one or more program routines to deny access by the seller to the sales-information data store and to the remote communications links to the external data sources, and to display an appropriate reminder message, if the seller has not 10 complied with the specified steps in the sales process. This gives the seller a large incentive both to comply with the process and to record data as required by the process. For example, the program routines may prevent the handheld unit 110 from accessing the vehicle-inventory information database if all required prospect data has not been entered. Alternatively, the routines may permit the handheld unit 110 to obtain the requested data from the sales 15 information data store, but then not permit the data to be displayed until all required prospect data has been entered. As with many of the program routines described for the handheld unit 110, these program routines may equivalently be located in and control the central computer unit 105 to prevent that unit from transmitting requested data to the handheld unit 110.

E) TIME STAMPS: The illustrative handheld unit 110 includes suitable conventional 20 programming for recording time stamps to identify the time and/or duration of performance of respective steps in the desired sale communication process. The time stamp records are used to record the actual time (either clock time or elapsed time during the sales encounter) at which the seller records specified information. This permits sales management to confirm with reasonable confidence that the seller is in fact performing the appropriate steps in the sales communication 25 process instead of, e.g., recording fabricated or "bogus" data all at once. For example, if the manager sees that a certain seller's tour of the dealership facilities with a prospect lasted only 15 seconds, the manager knows the seller has circumvented that step in the process and can counsel him or her. The time stamps can both be recorded locally at the handheld unit 110 or uploaded to the central computer unit 105 via the communications link for statistical analysis of seller

performance. Alternatively, the time stamp records can be created at the central computer unit 105 as prospect data and other data are transmitted by the handheld unit 110.

5 f) EXTERNAL CHECKS ON PROCESS COMPLETION: Suitable programming can be included in the handheld unit 110, the central computer unit 105, or both, for receiving and processing a signal from an external device indicating that a specified step in the sales communication process has been completed. The external device may be, e.g., a sensor in an vehicle key storage machine that signals when a particular seller, identified by a password or an electronic keycard (similar to a bank automated teller machine card), checks out the keys to a car for a test drive. Other external devices may be advantageously utilized to verify the physical location of the 10 seller at a particular time, thus serving as an additional check on the seller's compliance with the specified sales communication process.

Similarly, programming can be included for sending a signal to a gate controller to open a vehicle access gate. The seller, when driving out of the dealership parking lot for a test drive, thus can use the handheld unit 110 to send a signal to the gate controller, either directly or via 15 the central computer unit 105. The handheld computer 110 logs the fact that the seller is leaving the premises on a test drive with the prospect in question. Again, this verification of the seller's physical location at a particular time serves as a check on the seller's compliance with the sales process.

20 g) SELECTIVE AUDIO RECORDING: Conventional hardware and suitable programming may be included in the handheld unit 110 for selective audio recording of a conversation between the seller and the prospect. Selective audio recording of the actual conversation between the seller and the prospect can be useful. For example, Saleswoman A may be known to perform well in obtaining initial prospect wants and needs. Audio recording of this portion of her conversation with the prospect may be deemed unnecessary and thus can be skipped. On the 25 other hand, Salesman B may be weak in this area; when he indicates on the handheld unit 110 that he is in this phase of the desired sales communication process, the handheld unit 110 may automatically commence audio recording until the next phase of the conversation. Sales management is then able to selectively listen to the actual sales process as it progressed and counsel the seller on sales techniques. If required by privacy laws, the handheld unit 110 may be

programmed to play an audible message on commencement of recording, such as "to help ensure quality service, this conversation may be monitored or recorded."

h) FINANCING ASPECTS: The handheld unit 110 may include programming for transmitting identifying information about the prospect and a creditworthiness inquiry to a financial institution computer 125, and for receiving and processing a creditworthiness report from that computer. If the handheld unit 110 includes an input device that can store a signature digitally, then the prospect can be asked to "sign" an authorization granting the dealership permission to access the user's credit history. The input device may be a conventional pen- and touch-screen interface of the kind found in some PDAs; a similar device of the kind found at some cash registers for credit card authorizations; or the like. Access to the financial institution computer 125 may be via direct link or may be through a conventional data link such as a modem controlled by the central computer unit 105. The financial institution may be a credit bureau or an actual financing source. In the latter case, the financing source may perform its own credit check and make a preliminary creditworthiness determination to be transmitted back to the seller. This in turn helps the seller qualify the prospect, i.e., to determine the price range of the vehicle for which the prospect is likely to be able to obtain financing.

i) COMPUTATION OF FINANCE TERMS: The handheld unit 110 may include conventional programming enabling the seller to use it as a financial calculator for calculating, e.g., lease payments, loan payments, and the like. As the sales process progresses, the prospect data, creditworthiness report, and finance terms may be transferred to another handheld unit 110 or a central computer system 105 for finalization of paperwork or for negotiation purposes as described below.

j) REAL-TIME NEGOTIATION: The handheld unit 110 programming may include routines to permit the seller to send offers to and counteroffers to other handheld computers 110 or the central computer unit 105. A sales manager or similar person may read and respond to these exchanges, e.g., using another handheld unit 110 or a terminal 130 attached to the central computer 105. By eliminating most of the seller's trips back and forth from the prospect to the sales manager's desk, much of the time needed to consummate a sale is reduced. This reduction of time spent in the negotiating process is a vital element in improving sales efficiency since if

this process becomes extended, the prospect is increasingly likely to have misgivings and decline to consummate the sale. The capacity for real-time negotiation becomes increasingly valuable in situations of high activity (like a Saturday), when there are a large number of sellers per sales manager, when the average experience level of sellers is low, when there is a large number of sellers working at a single location, or when the physical distances at a given location between sellers and sales management are large.

5       K) REAL-TIME SALES PROGRESS DISPLAY: The programming of the handheld unit 110 may include routines for real-time computation and display of sales progress information applicable to the transaction. For example, the likelihood of closing the sale may be estimated and displayed on the handheld unit 110 by comparing factors such as (a) the length of time that the prospect has consented to spend with the seller during each step of the sales process, and/or 10 (b) the number of steps in the process that have been completed, with historical data on previous sales process outcomes (e.g., stored in the sales information data store) for that dealership, that city, etc. This likelihood may be displayed in a variety of ways (e.g., a percentage number, a 15 gas-gauge indicator, etc.) to show the likelihood of closing the sale going up as each step is completed. This encourages the seller to perform each step thoroughly, taking sufficient time to communicate the desired information to the prospect.

20       L) REAL-TIME SALES COMMISSION DISPLAY: The programming of the handheld unit 110 may include routines for real-time computation and display of the commission that would be paid to the seller if the sale were to be consummated on the specified terms. This can serve as a 25 powerful sales motivator for the seller.

25       M) COMPARATIVE RANKING AMONG SELLERS: The handheld unit 110 may also be programmed to display a list of sellers at the dealership, ranked by performance for a given period, e.g., by sales achieved in a given month. This constantly updated real-time display of sales rankings also can serve as a sales motivator for sellers.

N) DETERMINATION OF PARTICULAR PROSPECT INTERESTS: The programming and data structures of the handheld unit 110 may also be designed such that answers to scripted questions provide an indication of the prospect's general interests (sometimes referred to here as "motivations") or specific interests (sometimes referred to here as "hot buttons"). For example,

the prospect's responses to questions may indicate that the prospect is generally interested in safety. Other typical prospect motivations include performance, economy, and style, to name but a few examples. Moreover, the prospect may be specifically interested in features of a car such as air bags, trailer towing packages, etc. Some or all of these various interests may have different degrees of importance to different prospects.

If a prospect's answers to questions (alone or in combination) indicate the presence of one or more general interests or specific interests, that fact(s) is noted by setting one or more flags within an appropriate data structure, either within the handheld unit 110 or within the central computer unit 105. The handheld unit 110 then prompts the seller to ask specific additional scripted questions or make specific additional comments related to that interest to help focus the discussion. The handheld unit 110 thus helps the seller do what an expert seller likely would do intuitively.

This can be implemented in a variety of ways. For example, the programming of the handheld unit 110 may be designed so that the required flags are maintained in a suitable data structure in memory within the handheld unit. The term "flag" is used here to include values of specific data variables. For example, if a prospect's responses indicate that she has two children, ages 4 and 2, the fact that she has children and their respective ages may be recorded in appropriate variables and used as flags concerning safety as a motivation and for fold-down child seats as a possible hot button. Then again, if the prospect's answers indicate that she affirmatively does not plan to use the car to carry her children (e.g., she is buying the car for her college-bound oldest child), the fact that she has younger children may be overridden.

The overall logic of the programming in this regard is quite simple: At one or more appropriate points in the encounter between the seller and the prospect, if a flag is set indicating that the prospect has a particular motivation (as determined, e.g., by the prospect's responses to particular questions), then the seller is prompted to provide information or ask questions relevant to that motivation. For example, if a flag is set indicating that safety is a motivation for the prospect, then at one point in the encounter the seller is prompted to mention the fact that the vehicle has side air bags; at another point the seller is prompted to mention the vehicle's built-in, fold-down child seats; and so on.

Motivation switches and hot buttons of this kind can also be implemented in whole or in part in the central computer unit 105. For example, the central computer unit may determine from the prospect's ZIP code that the prospect lives in an area in which mini-vans are popular. In response, it may prompt the seller, via the handheld unit 110, to suggest to the prospect that "you know, a lot of people in your neighborhood are buying this model of mini-van."

As would be apparent to one skilled in the art, conventional programming methods can be used to determine a prospect's motivations and hot buttons. Thus, the actual implementation of the required programming is immaterial here.

o) SELECTIVE PRESENTATION OF PRODUCT OPTIONS: Many products sold to the public include various options. For example, cars, trucks, and similar vehicles often come with options such as air conditioning, a trailer-towing package, built-in child seats, etc. A seller will frequently make a sales presentation about a specific example of a product, e.g., a specific car or truck on the lot. It may be desirable for the seller to talk only about options actually installed on that specific car or truck. An experienced seller is likely to know this. A novice seller, on the other hand, may not be aware which options are installed on the particular car or truck (or may not even be aware of the extent of the available options).

The programming and data structures of the handheld unit 110 therefore may be designed to be sensitive to the actual options installed on a particular vehicle. The vehicle identification may be obtained and inputted into the handheld unit 110 in any convenient manner, e.g., by selecting from a menu of available vehicles having specified characteristics or by direct entry of the factory-applied vehicle identification number (VIN). Information about the options installed on that particular vehicle may be stored in the sales-information data store as described above.

The programming for the sales communication process can then easily be designed to prompt the seller to talk at a suitable point about the specific options already installed on the vehicle, e.g., in response to the motivation switches and hot buttons described above. The script for the sales communication process can include suitable remarks for the seller to make, e.g., "this particular car has the new high-performance engine already installed." Additional information about the option can be displayed if desired, either automatically or in response to a command inputted by the seller.

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The programming and data structures of the handheld unit 110 can also be designed to provide the seller with a list of options that could be installed on that vehicle if desired. In that way, if the prospect indicates interest in other options, the seller can respond with an appropriate list.

5 If the prospect indicates interest in an option not already installed on that vehicle, the handheld unit 110 may identify from the sales-information data store a vehicle that does already contain that option and display that information to the seller.

If the prospect is trying to decide which specific vehicle he or she prefers, the handheld unit 110 may display a compare-and-contrast list of options for each vehicle, e.g., in table form.

10 It will be appreciated by those of ordinary skill having the benefit of this disclosure that programming of these option-sensitive features is conventional. A simple implementation entails providing, in the sales-information data store, a data structure with option information about each specific vehicle on the lot. Depending on the implementation, the data structure may include a flag indicating the presence of an option and/or more detailed information about the 15 option. The portion of the programming that causes display of a script on the handheld unit 110 simply checks the data structure to determine whether a particular option is present and modifies the script accordingly (possibly depending on other factors such as whether the prospect has expressed any interest in the option).

P) INCORPORATING PROSPECT INFORMATION INTO CUSTOMIZED SCRIPTS: The data 20 collected about the prospect during the sales presentation can be used to customize the script displayed to the seller through simple parameter substitution. The customized script can reflect information such as the prospect's name, spouse's name, children's names, current vehicle owned, mileage on current vehicle, etc. This may help the inexperienced seller build a rapport with the prospect in the same way that experienced sellers do. The customization can be readily 25 implemented in conventional fashion in the programming of the handheld unit 110, the central computer unit 105, or both, as convenient.

The simplest example of such customization is probably the parameterized substitution of the client's name into the script. Some sellers believe that use of the prospect's name is a key factor in building a rapport with the prospect. Suppose that the seller has input data into the

handheld unit 110 (or retrieved it from the sales-information data store) indicating that the prospect is female, she is a physician, and her last name is Jones. At an appropriate point the script might include a reminder to work the prospect's name into the conversation. The unsubstituted script might read "<Title> <Last\_Name>, if you have time, let's take a test drive."

5 As displayed to the seller on the handheld unit 110, it would read "Dr. Jones, if you have time, let's take a test drive."

As a more sophisticated example, suppose that the prospect, Dr. Jones, has said that she has a one-year old son John and that she is interested in a particular model of mini-van because it has built-in child seats. If the script is option-sensitive as described above, at an appropriate 10 point it can suggest that the seller make a comment such as "You see the child seats back here -- they're designed for children three months to five years old, so <Child\_Name> should be able to use it till he's big enough to go without one." As displayed to the seller on the handheld unit 110, the script reads ". . . so John should be able to use it till he's big enough to go without one."

15 Q) "RECAPPING" SCRIPT SEGMENT: One skill of an experienced seller is the ability to remember those features of a product that aroused the prospect's interest during the sales communication process and to recap them orally during the closing stages of the process. To the extent that the seller provided data to the handheld unit 110 indicating the prospect's interest in specific options (or if the data was already present in a sales-information data store), then upon a 20 suitable command from the seller (possibly in response to a reminder prompt from the handheld unit 110), a recap list of those options is displayed on the handheld unit 110. Alternatively, the handheld unit 110 can display the recap list automatically when the information available suggests that the sales communication process has entered a specified phase.

25 R) "MANAGER HELP" BUTTON: For any given prospect, an inexperienced seller is likely to encounter difficulties at some point. The seller might not be saying the right things at the right time. There might be a personality conflict, mild or severe. There are undoubtedly dozens of reasons why any given sales communication process might go badly for an inexperienced seller.

Consequently, inexperienced sellers are trained to go get their managers if they sense that they are losing control of the sales communications process with a given prospect.

Unfortunately, this often entails a seller asking the prospect to wait while the seller finds the manager. As often as not, the prospect seizes the opportunity to depart gracefully — resulting in 5 a lost sales opportunity. This can cause inexperienced sellers to be reluctant to leave the prospect to go the manager. In those cases where an experienced sales manager can be discretely brought into the sales communication process, however, there is a reasonable chance that the situation can be turned around and the prospect converted into a buyer.

To address this situation, the handheld unit 110 may include a "Manager Help" button.

10 The Manager Help button is very similar in concept to the "panic button" found on handheld units available for some home-security systems — a householder can keep the handheld unit on or near his or her person; pressing the panic button transmits a signal to the security service, which sends someone to investigate.

15 The Manager Help button may be conventionally implemented in hardware or, preferably, in software as an icon or menu choice on the display of the handheld unit 110. When the seller "hits the button" (literally or figuratively), the handheld unit 110 signals the central computer unit 105 that a manager's assistance is required. The central computer unit 105 then generates an appropriate message on, e.g., a terminal in the sales manager's office. The message may include information such as the seller's identity and a summary of what has transpired in 20 the sales communication process with that prospect. The sales manager can then "stop by" and very naturally introduce him- or herself into the sales process.

25 The Manager Help button can be implemented so that pressing the button brings up a menu or a series of icons indicating different kinds of available assistance. The available assistance might include items such as "Soft drinks" (resulting in someone coming to take the prospect's drink order), "Service department," (resulting in a service-department representative coming to join the conversation), and the like. One or more of these items can be in addition to, or in lieu of, the manager assistance described above.

s) CACHING OF SCRIPTS, ETC.: If a suitably fast wireless link is available between the handheld unit 110 and the central computer unit 105, then the handheld unit can be programmed

to interact with the central computer unit on a real-time basis while in use and while in range of the central computer unit. Thus, when a seller is using the handheld unit 110 in range of the central computer unit, it effectively acts as a wireless terminal for the latter unit.

In that way, the seller uses the most current version of the scripts, sales information, etc. (referred to here as the "information load" of the handheld unit), as is practicable. That means, for example, that the seller will have up-to-date information about the vehicle inventory; he or she will not attempt to sell a prospect a vehicle that has already been sold, nor attempt to show a vehicle that is already being test-driven by another prospect (assuming that such information is kept current in the central computer unit 105).

But the handheld unit 110 is designed to be used in a mobile environment. There likely will be times when the handheld unit is out of range of the central computer unit 105, e.g., if the seller is on a test drive with a prospect.

To address that problem, the information load may be periodically downloaded from the central computer unit 105 into storage (preferably nonvolatile storage such as a hard disk drive or nonvolatile RAM) on the handheld unit 110. That makes the information load available for use by the seller even if the handheld unit loses contact with the central computer unit. In concept, such downloading is much like the "caching" of Web pages, graphics, etc., by browsers such as Microsoft's Internet Explorer and Netscape's Navigator, so that the Web pages and graphics can be viewed even if the user does not have a current connection to the Internet.

The downloading operation is preferably performed automatically upon startup of the handheld unit 110, e.g., through the use of an AUTOEXEC.BAT file or a Windows 95 Startup program. Such downloading, when successful, ensures that the handheld unit gets a current information load.

T) DATA COMPRESSION: If desired, the downloading may use data-compression and - decompression techniques to speed up the data transmission. That is, the central computer unit 105 may use any of a variety of conventional data-compression algorithms to substitute short strings of characters in place of long strings. For example, in the so-called dictionary approach, the central computer unit 105 would transmit comparatively short codes in place of longer strings of data characters; the handheld unit 110, using a compatible dictionary, would translate

the codes back into the original longer strings of data characters. (The programming of the handheld unit 110 can be designed to store the data in compressed form and decompress on an as-needed basis instead of decompressing it immediately upon receipt.) Well-known examples of dictionary-based data compression include those pioneered by Lev and Zimpel as well as several variations on the basic LZ approach such as Lev-Zimpel-Welch (LZW); in these examples, dictionaries are built up "on the fly" to match the actual data transmitted.

10 u) REFRESH-TYPE UPDATING: If the information load is downloaded into nonvolatile storage in the handheld unit 110, the downloading operation can be conventionally designed to function in the well-known "refresh" mode. That is, the central computer unit 105 determines which portions of the desired current information load are already present in the handheld unit 110 and downloads only those portions that are not already present. The refresh operation may be performed in any convenient manner. One simple approach is for the central computer unit 105 to send a signal to the handheld unit 110 directing the handheld unit to provide a directory listing of the separate data files making up its information load, including the dates and times of each file. That information can be used by the central computer unit to determine which files should be updated. Alternatively, conventional record-level marking or tagging can be used to determine which if any record(s) in a database of scripts, sales information, etc., are candidates for updating.

20 v) PERIODIC UPDATING OF DATA: After initialization of the information load, selected portions thereof may be updated from time to time to reflect ongoing changes in the sales information data store. For example, a car dealership may refresh its handheld units 110 by downloading updated data whenever a specific vehicle is sold, so that other sellers will no longer attempt to test-drive that vehicle; or whenever new vehicles are added to the inventory. The update operation may be performed on a periodic basis, e.g., once per hour, once every four hours, etc. It may also be performed on an as-needed basis, e.g., when an inventory item (such as a specific vehicle) is sold or is added to the inventory. The update operation could be performed in some combination of periodic and as-needed basis. The update operation may be initiated by each handheld unit 110 or by the central computer unit 105.

#### 4.6 Description of Specific Illustrative Embodiment

HARDWARE: One possible embodiment of the handheld unit 110 is the Fujitsu Stylistic 1000 RF, shown in Figure 2 identified by the reference numeral 200 / 110, running the Microsoft Windows 95 operating system. In implementations involving outdoor sales work (e.g., car dealerships), the available transreflective monochrome liquid-crystal display (LCD) option is preferred for the screen 205 for greater visibility in sunlight. This model of the Stylistic 1000 includes an antenna 210 for a spread-spectrum radio; if a different model without a built-in wireless link is used, then a separate unit such as an ARLAN wireless LAN adapter can be inserted into the PCMCIA slot (sometimes called the PC Card slot) on the handheld unit. Data entry can be accomplished with a stylus 215. The unit advantageously includes a hot-swappable battery, permitting the battery to be changed without powering down the unit. At this writing, more detailed information is available at

<http://www.fpsi.fujitsu.com/products/st10RF.htm>.

A) SOFTWARE - SCREEN DISPLAYS, DATA ENTRY: Figures 3 through 21 show examples of screen displays and data entry fields. The examples are from an experimental prototype of the invention designed for use in car dealerships. The Figures show fictitious prospect data in the displays. It will be appreciated by those of ordinary skill having the benefit of this disclosure that other screen arrangements are possible and, in other contexts, may be preferable to the ones shown here; for example, an implementation of the invention for use in a jewelry store obviously will be different from the car-dealership illustration shown in the drawings. Which specific screen arrangement to use in a given context is a matter of design choice for the artisan.

As seen in Figures 3 through 20, the prototype display- and data-entry screens for a given prospect are conventionally organized by representations of notebook tabs shown at the bottom of each screen. A given screen can be brought up on the display 205 of the handheld unit 110 by clicking with the stylus 215 on the appropriate tab. As is customary for such a display organization, the tab for screens not actually being viewed may be shown in a different color or shading than the tab for the screen being viewed. The specific prototype display / data entry screens shown in the Figures are described in Table 1 below; three-letter codes correspond to the codes at the lower right portion of various (but not all) screens.

TABLE 1: DESCRIPTION OF SELECTED FIGURES

Figure 3	INF	Prospect info	Basic information about the prospect, e.g., name, address, phone number
Figure 4	PER	Prospect personal data	More detailed information about the prospect such as Internet address, nickname, hobbies
Figure 5	COB	Co-buyer data	Information about a co-buyer such as a husband or wife
Figure 6	WAN	Prospect wants	Details about what the prospect wants in a vehicle
Figure 7	TRA	Trade-in	Information about the car the prospect wants to trade in
Figure 8	APP	Trade-in appraisal	Trade-in appraisal information
Figure 9	SEL	Vehicle search (Attributes and Price / Payment tab)	A form for searching the sales data store to locate vehicles matching specific criteria
Figure 10	SEL	Vehicle search (Options tab)	A form for searching the sales information data store to locate vehicles matching specific criteria
Figure 11		Vehicles found	A list of vehicles found in the sales information data store that match the search criteria, along with detailed information about a highlighted vehicle
Figure 12	VEH	Selected vehicle	Information about a specific vehicle; includes a "Hold for salesman" button in the lower right corner to place a temporary hold on the vehicle
Figure 13	CBI	Credit bureau inquiry	Displays information to be sent to a credit bureau. Includes a "Send" button in the lower right corner, which causes a credit inquiry signal to be transmitted.
Figure 14	OFF	Prospect offer	A screen showing the current status of offers and counteroffers.
Figure 15	SOL	Sold	Information about a specific vehicle sold to a specific prospect
Figure 16	DEL	Delivered	Information about a specific vehicle delivered to a specific prospect

TABLE 1: DESCRIPTION OF SELECTED FIGURES

Figure 17	Select a vehicle position	A graphical touch-screen prompt that brings up script prompts with suggested points for the seller to discuss about the area of the car touched (see Figures 18, 19). If the sales information data store contains enough specific information about the various makes and models of vehicles, additional touch-screen prompts can be "nested," e.g., touching the "Interior" region brings up a list (or diagram) of interior features such as air conditioning, cruise control, etc.	
Figure 18	Speed Control	A sample script prompt; includes three navigation buttons Next, Previous, More.	
Figure 19	Speed Control	Another sample script prompt.	
Figure 20	BEB	Sales Manager	A screen brought up when the seller wants to close out the prospect record. Data fields marked by an asterisk are the minimum data that the seller should collect and record to be able to return to the main menu. The "beback" date and time fields indicate when the prospect has indicated s/he will return.
Figure 21			An example of a dialog box with a suggested script and three buttons for the seller to choose from. Includes two navigation buttons, Top and Previous, at the top right of the dialog box.

b) SOFTWARE - SCRIPT BUTTONS: Many of the screens have two rows of "buttons" at the top of the screen (with some buttons grayed out in some of the screens). Clicking on a button in the second row causes the handheld unit 200 / 110 to begin running a script for the corresponding phase or "step" of the sales presentation process as described in Table 2. An asterisk may be displayed in one of these step-related buttons to indicate that the seller has worked through enough of the script for the step in question that the step can be marked as complete. For example, in Figure 3, the GRT button has an asterisk to show that the Greeting step has been sufficiently completed.

10 The script (reproduced in Figures 22 through 70) prompts the user to say certain things to the prospect and to enter certain data at specific points in the sales presentation process; the data

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entered are displayed on the screens described above. Many but not all of the three-letter codes for the scripts are the same as the three-letter codes for the screens listed in Table 1.

TABLE 2: SCRIPTS IN PROTOTYPE SELLER PROCESS

GRT	Greeting the prospect
WAN	Determining the prospect's wants
SEL	Selecting an actual vehicle
PRO	Product presentation (a detailed product-presentation script with prompts for discussion of features found in specific vehicles is in the file SCRIPT.RPT in the microfiche appendix).
DEM	Demo of a vehicle
TRA	Trade-in
SER	Service department (often user-defined to be specific to the dealership)
WRI	Write up the order (offers and counter-offers)
SOL	Update the information on the vehicle sold
DLR	Dealer-defined, e.g., "why should you buy your car here" information

The script, shown in Figures 22 through 70, can be thought of as a flowchart expressed in words. Each "line" of the script, referred to as a record, contains information as described in Table 3 below. Execution of the script by the handheld unit 200 / 110 causes a dialog box (see, e.g., the "Welcome to ABC Motors. How may I assist you today" dialog box shown in Figure 21) to be displayed "over" the screen that is currently being displayed (e.g., the Prospect Info screen shown in Figure 3).

10

TABLE 3: SCRIPT CONTENTS

SCRIPT	Text to be displayed in the dialog box to prompt the seller to say specific things to the prospect. For example, in Figure 27, at the script record labeled DEM 0100, the seller is prompted to say "Let me start the car, and I'll show you more about the interior of this vehicle."
ANSWER	The text of zero or more buttons, menu choices, etc., to be displayed as part of the dialog box so that, e.g., the seller can indicate the prospect's response to the SCRIPT TEXT. For example, in Figure 27, three potential answers are displayed: OK, No time, and Not buying.

TABLE 3: SCRIPT CONTENTS

GOTO	Indicates that, when this script record is executed, a different screen is to be displayed "under" the dialog box. For example, in Figure 36, script record SEL 0020 contains the entry SEL in the GOTO field. This indicates that when this record is executed by the handheld unit 200 / 110, the "Vehicle search" screen shown in Figure 9 (whose three-letter code is SEL) is displayed under the dialog box.
PUT DATA, FIELD	Specific data values to be entered in specific fields in the sales-information data store. For example, in Figure 38, if the seller clicks on the answer indicating that the prospect's trade-in is being financed by FMCC, then the value "FMCC" is assigned ("put") to the field TRADELIENNAM (trade-in lienholder name).
STEP, SEQ	The next record of the script to be executed (which can vary depending on which prospect response is selected). For example, in Figure 27, if the prospect's answer to "Let me start the car ..." is "OK," then the handheld unit 200 / 110 executes script record DEM 0140, which suggests that the seller "[t]ake the time to explain or review one or more of the interior features covered in the product presentation."
* (asterisk)	Indicates that, when the script record in question is completed, the entire "step" can be marked as complete. For example, in Figure 36, the "Y" entries in script records SEL 0020, 0030, and 0040 indicate that if any of these three records is executed, the entire Vehicle search step in the sales presentation process, whose three-letter code is SEL, can be marked as complete (see, e.g., the asterisk in the SEL button shown at the top of Figure 12).

c) SOFTWARE - OTHER BUTTONS: Referring to Figure 3 as an example, the top row of buttons includes the buttons Show Script; Close Pros[p]ect, and Manager. The Show Script button causes the handheld unit 110 to resume running a script that was suspended by the seller (using a Hide Script button, not shown). The Close Pros[p]ect button signifies that the sales presentation has ended, either with or without a sale. The Manager button causes a signal to be sent to summon a sales manager as described in Section 4.5(r) above.

D) SOURCE CODE: It will be appreciated by those of ordinary skill having the benefit of this disclosure that much more detail about the operation of the prototype can be found in the source code reproduced in the microfiche source code appendix. The code is written to be compiled with the Microsoft® Visual C++ compiler.

#### 4.7 Other Remarks

Use of the system described above helps management enforce the desired standardization of the sales process. The seller cannot advance through the prescribed sales process until he or she has completed all prior steps. In this way, management is assured that each prospect receives the treatment that has been deemed most effective in making a sale.

For example, the handheld unit 110 ordinarily allows the seller to retrieve and view sales information from the sales information data store for the benefit of the prospect (e.g., to determine whether a particular model is in stock). However, if the seller has not recorded the prospect's personal information such as name, address, and telephone number, the system will not allow the seller to retrieve that information. Thus, unless the seller follows the prescribed program, he or she is effectively prevented from proceeding. However, if the seller progresses through the prescribed steps, the handheld unit 110 may inform the sales management of each step completed successfully. In this way, management keeps abreast of which transactions have been dragging in critical stages, when management assistance might be useful.

The system provides other benefits besides adherence to the sales process. New sellers are easily trained on the job: once they learn to use the sales machine, it gives them a step-by-step script to follow, taking the guesswork out of the learning process.

Sellers are prompted through a thorough product presentation of features and benefits. These product presentations are specific to the product that the prospect desired to purchase and are tailored to address both the general and specific interests of the prospect.

Also, management now has an accurate picture of each seller's sales efficiency (ratio between number of sales completed per number of prospects seen). In a paper based system, sellers had a disincentive to record the visits of prospects who made no purchase, so management did not get any real idea of how well each seller was performing.

25

#### 4.7 Program Storage Device

As noted above, any of the foregoing variations may be implemented by programming a suitable general-purpose computer having appropriate hardware such as a microprocessor, memory, and a communications device such as a modem (preferably wireless for the handheld

device 110). The programming may be accomplished through the use of a program storage device readable by the computer and encoding a program of instructions executable by the computer for performing the operations described above. The program storage device may take the form of, e.g., one or more floppy disks; a CD ROM or other optical disk; a magnetic tape; a read-only memory chip (ROM); and other forms of the kind well-known in the art or subsequently developed. The program of instructions may be "object code," i.e., in binary form that is executable more-or-less directly by the computer; in "source code" that requires compilation or interpretation before execution; or in some intermediate form such as partially compiled code. The precise forms of the program storage device and of the encoding of instructions are immaterial here.

\* \* \*

It will be apparent to those of ordinary skill having the benefit of this disclosure that numerous variations are possible from the illustrative embodiments described above. Accordingly, it is the claims below and not the illustrative embodiments that measure the 15 exclusive rights claimed in the invention.

## WHAT IS CLAIMED IS:

1. A sales support computer comprising:
  - 5 a) means operable by a seller for recording prospect data about a prospect, including information about at least one particular interest of the prospect; and
  - b) means for prompting the seller to perform a specified sequence of steps in a desired sales communication process during a meeting with the prospect in response to the at least one particular interest of the prospect.
- 10 2. The sales support computer of claim 1 wherein the sales support computer is of a size suitable for the computer to be held in the seller's hand.
- 15 3. The sales support computer of claim 1 wherein the particular interest is selected from the group consisting of safety, economy, performance, style, trailing towing capacity, side airbags, and anti-lock braking.
- 20 4. The sales support computer of claim 1 wherein the information about at least one particular interest of the prospect includes information about the composition of the prospect's family.
- 25 5. The sales support computer of claim 1, wherein the prompting to perform specified sequence of steps includes prompting the seller to say specific prospect-related information aloud.
6. The sales support computer of claim 5, wherein the specific prospect-related information comprises the prospect's name.
7. The sales support computer of claim 5, wherein the specific prospect-related information comprises information about a product option in which the prospect has indicated an interest.

8. The sales support computer of claim 5, wherein the specific prospect-related information comprises a recap list of information about product options in which the prospect has indicated an interest.

5 9. The sales support computer of claim 1, further comprising:  
c) means for prompting the seller with a script of product features and benefits.

10. The sales support computer of claim 1, further comprising:  
c) means for displaying a list of options available for a specific product.

10 11. The sales support computer of claim 1, further comprising:  
c) means for simultaneously displaying information about the availability of one or more specified options for two or more specific products.

15 12. The sales support computer of claim 1, further comprising:  
c) means for displaying a table of option availability for two or more specific products.

13. The sales support computer of claim 1, further comprising:  
20 c) means for summoning assistance for the seller.

14. The sales support computer of claim 1, further comprising:  
c) means for retrieving information from an external data store.

25 15. The sales support computer of claim 14, wherein the retrieved information comprises consumer credit information.

16. The sales support computer of claim 1, further comprising:

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- c) means for retrieving and displaying sales information from a sales information data store; and
- d) means for preventing the seller from perceiving sales information from the sales information data store unless the seller records the prospect data.

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17. The sales support computer of claim 1, further comprising:

- c) means for retrieving and displaying sales information from a sales information data store; and
- d) means for preventing the seller from perceiving sales information from the sales information data store if the seller does not comply with the desired sales communication process.

10

18. The sales support computer of claim 1, further comprising:

- c) means for accessing an external data store, and
- d) means for preventing the seller from retrieving information from the external data store if the seller does not comply with the desired sales communication process.

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19. The sales support computer of claim 1, further comprising:

- c) means for recording the duration of performance of respective steps in the desired sale communication process.

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20. The sales support computer of claim 19, wherein the means for recording the duration of performance of respective steps in the desired sales communication process comprises means for recording time stamps identifying the respective times of performance of the steps.

25

21. The sales support computer of claim 1, further comprising:

- c) means for transmitting a creditworthiness inquiry about the prospect to a financial institution, and

- d) means for receiving a creditworthiness report on the prospect.

22. The sales support computer of claim 21, further comprising:

- e) means for recording a representation of the prospect's signature, and
- f) transmitting a representation of the prospect's signature to the financial institution.

23. The sales support computer of claim 1, further comprising:

- c) means for transmitting a sales offer and means for receiving a response to the offer.

24. The sales support computer of claim 1, further comprising:

- c) means for locally storing at least a portion of a sales information data store; and
- d) means for periodically updating said locally-stored portion.

25. A sales support computer comprising:

- a) means operable by a seller for recording prospect data about a prospect, including information about at least one particular interest of the prospect;
- b) means for prompting the seller to perform a specified sequence of operations in a desired sales communication process during a meeting with the prospect, said operations including (1) recording prospect data, and (2) telling the prospect about a product option correlated with the prospect's particular interest; and
- c) means for restricting the seller's ability to use the sales support computer if the seller does not perform the specified sequence of operations.

26. The sales support computer of claim 25, wherein the particular interest is selected from the group consisting of safety, economy, performance, style, trailing towing capacity, side airbags, and anti-lock braking.

27. The sales support computer of claim 25, wherein the information about at least one particular interest of the prospect includes information about the composition of the prospect's family.

5 28. A sales support computer comprising:

- a) means operable by a seller for recording prospect data about a prospect, including information about at least one particular interest of the prospect;
- b) means for querying a sales information data store to determine the availability of specific products having one or more features correlated with the prospect's particular interest;
- c) means for prompting the seller to perform a specified sequence of operations in a desired sales communication process during a meeting with the prospect, said operations including:
  - (1) recording prospect data, and
  - (2) telling the prospect about one or more features that are correlated with the prospect's particular interest; and
- d) means for restricting the seller's ability to use the sales support computer if the seller does not perform the specified sequence of operations.

20 29. The sales support computer of claim 28, wherein the particular interest is selected from the group consisting of safety, economy, performance, style, trailing towing capacity, side airbags, and anti-lock braking.

25 30. The sales support computer of claim 28, wherein the information about at least one particular interest of the prospect includes information about the composition of the prospect's family.

31. A sales support computer comprising:

- a) means operable by a seller for recording prospect data about a prospect, including information about at least one particular interest of the prospect;
- b) means for querying a sales information data store to determine the availability of specific products having one or more features correlated with the prospect's particular interest;
- c) means for prompting the seller to perform a specified sequence of operations in a desired sales communication process during a meeting with the prospect, said operations including recording prospect data;
- 10 d) means for recording the duration of performance of respective operations in the desired sales communication process; and
- e) means for restricting the seller's ability to use the sales support computer if the seller does not perform the specified sequence of operations.

15 32. The sales support computer of claim 31, wherein the particular interest is selected from the group consisting of safety, economy, performance, style, trailing towing capacity, side airbags, and anti-lock braking.

20 33. The sales support computer of claim 31, wherein the information about at least one particular interest of the prospect includes information about the composition of the prospect's family.

25 34. A sales support computer comprising:

- a) means operable by a seller for recording prospect data about a prospect, including information about at least one particular interest of the prospect;
- b) means for querying a credit information data store to get an indication of the prospect's creditworthiness;
- c) means for prompting the seller to perform a specified sequence of operations in a desired sales communication process during a meeting with the prospect, said

operations including (1) recording prospect data and (2) telling the prospect about one or more product features suggested by one or more particular interests of the prospect; and

5 d) means for restricting the seller's ability to use the sales support computer if the seller does not perform the specified sequence of operations.

35. The sales support computer of claim 34, wherein the particular interest is selected from the group consisting of safety, economy, performance, style, trailing towing capacity, side airbags, and anti-lock braking.

10 36. The sales support computer of claim 34, wherein the information about at least one particular interest of the prospect includes information about the composition of the prospect's family.

15 37. A sales support computer comprising:

a) means operable by a seller for recording prospect data about a prospect, including information about at least one particular interest of the prospect;

b) means for querying a credit information data store to get an indication of the prospect's creditworthiness;

20 c) means for querying a sales information data store to determine the availability of specific products having one or more features correlated with one or more particular interests of the prospect;

d) means for prompting the seller to perform a specified sequence of operations in a desired sales communication process during a meeting with the prospect, said operations including (1) recording prospect data and (2) telling the prospect about at least one of said one or more features; and

25 e) means for restricting the seller's ability to use the sales support computer if the seller does not perform the specified sequence of operations.

38. The sales support computer of claim 37, wherein the particular interest is selected from the group consisting of safety, economy, performance, style, trailing towing capacity, side airbags, and anti-lock braking.

5 39. The sales support computer of claim 37, wherein the information about at least one particular interest of the prospect includes information about the composition of the prospect's family.

10 40. The sales support computer of claim 37, further comprising means for summoning assistance for the seller.

41. A sales support computer comprising:

- a) means operable by a seller for recording prospect data about a prospect, including information about at least one particular interest of the prospect;
- 15 b) means for querying a credit information data store to get an indication of the prospect's creditworthiness;
- c) means for querying a sales information data store to determine the availability of specific products having one or more features correlated with one or more particular interests of the prospect;
- 20 d) means for prompting the seller to perform a specified sequence of operations in a desired sales communication process during a meeting with the prospect, said operations including recording prospect data;
- e) means for restricting the seller's ability to use the sales support computer if the seller does not perform the specified sequence of operations; and
- 25 f) means for summoning assistance for the seller

42. The sales support computer of claim 41, wherein the particular interest is selected from the group consisting of safety, economy, performance, style, trailing towing capacity, side airbags, and anti-lock braking.

5 43. The sales support computer of claim 41, wherein the information about at least one particular interest of the prospect includes information about the composition of the prospect's family.

44. A sales support computer comprising:

- 10 a) means for locally storing a copy of at least a portion of a sales information data store external to the sales support computer;
- b) means operable by a seller for recording prospect data about a prospect, including information about at least one particular interest of the prospect;
- c) means for querying a credit information data store to get an indication of the prospect's creditworthiness;
- 15 d) means for querying said sales information data store to determine the availability of specific products having one or more features correlated with one or more particular interests of the prospect, including determining whether a communications link exists with the sales information data store, and if so, querying the sales information data store, otherwise querying said locally-stored copy;
- e) means for prompting the seller to perform a specified sequence of operations in a desired sales communication process during a meeting with the prospect, said operations including (1) recording prospect data and (2) telling the prospect about at least one of said one or more features;
- 20 f) means for recording the duration of performance of respective operations in the desired sales communication process;
- g) means for restricting the seller's ability to use the sales support computer if the seller does not perform the specified sequence of operations; and

h) means for summoning assistance for the seller.

45. A sales support computer comprising:

- a) means for locally storing a copy of at least a portion of a sales information data store external to the sales support computer;
- b) means for periodically updating said locally-stored copy;
- c) means operable by a seller for recording prospect data about a prospect, including information about at least one particular interest of the prospect;
- d) means for querying a credit information data store to get an indication of the prospect's creditworthiness;
- e) means for determining the availability of specific products having one or more features correlated with one or more particular interests of the prospect, including determining whether a communications link exists with the sales information data store, and if so, querying the sales information data store, otherwise querying said locally-stored copy;
- f) means for prompting the seller to perform a specified sequence of operations in a desired sales communication process during a meeting with the prospect, said operations including (1) recording prospect data and (2) telling the prospect about at least one of said one or more features;
- g) means for recording the duration of performance of respective operations in the desired sales communication process;
- h) means for restricting the seller's ability to use the sales support computer if the seller does not perform the specified sequence of operations; and
- i) means for summoning assistance for the seller.

46. A sales support computer comprising:

- a) a processor;
- b) a pen-based user interface;
- c) a wireless communications interface;

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- d) a data store;
- e) a program store containing programming executable by the processor for carrying out operations including:
  - 1) downloading, via the wireless communications interface into the data store, a copy of at least a portion of a sales information data store external to the sales support computer;
  - 2) receiving, via the pen-based user interface, data inputted by a seller about a prospect, referred to as prospect data, including information about at least one particular interest of the prospect;
  - 3) querying said sales information data store to determine the availability of specific products having one or more features correlated with one or more particular interests of the prospect, including determining whether a communications link exists with the sales information data store, and if so, querying the sales information data store via the wireless communications interface, otherwise querying said locally-stored copy;
  - 4) prompting the seller to perform a specified sequence of operations in a desired sales communication process during a meeting with the prospect; and
  - 5) restricting the seller's ability to use the sales support computer if the seller does not perform the specified sequence of operations.

47. A portable sales support computer comprising:

- a) a processor;
- b) a pen-based user interface;
- c) a wireless communications interface;
- d) a data store;
- e) a program store containing programming executable by the processor for carrying out operations including:

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- 1) downloading, via the wireless communications interface into the data store, a copy of at least a portion of a sales information data store external to the sales support computer;
- 2) receiving, via the pen-based user interface, data inputted by a seller about a prospect, referred to as prospect data, including information about at least one particular interest of the prospect;
- 3) querying a credit information data store via the wireless communications interface to get an indication of the prospect's creditworthiness;
- 4) querying said sales information data store to determine the availability of specific products having one or more features correlated with one or more particular interests of the prospect, including determining whether a communications link exists with the sales information data store, and if so, querying the sales information data store via the wireless communications interface, otherwise querying said locally-stored copy;
- 5) prompting the seller to perform a specified sequence of operations in a desired sales communication process during a meeting with the prospect, said operations including (1) inputting prospect data and (2) telling the prospect about at least one of said one or more features;
- 6) recording the duration of performance of respective operations in the desired sales communication process;
- 7) restricting the seller's ability to use the sales support computer if the seller does not perform the specified sequence of operations; and
- 8) in response to a command inputted by the seller, transmitting via the wireless communications interface a signal summoning assistance for the seller

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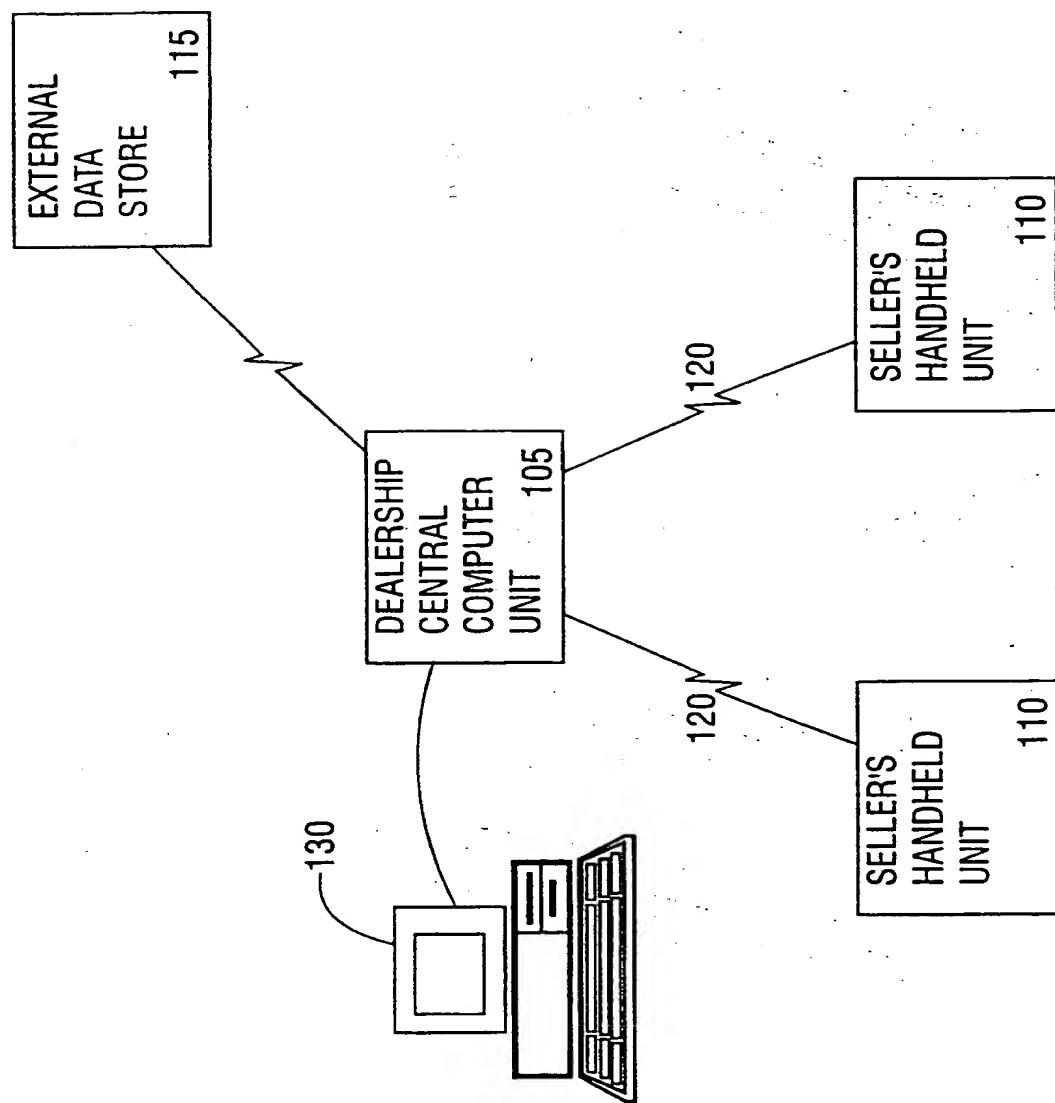


FIG. 1

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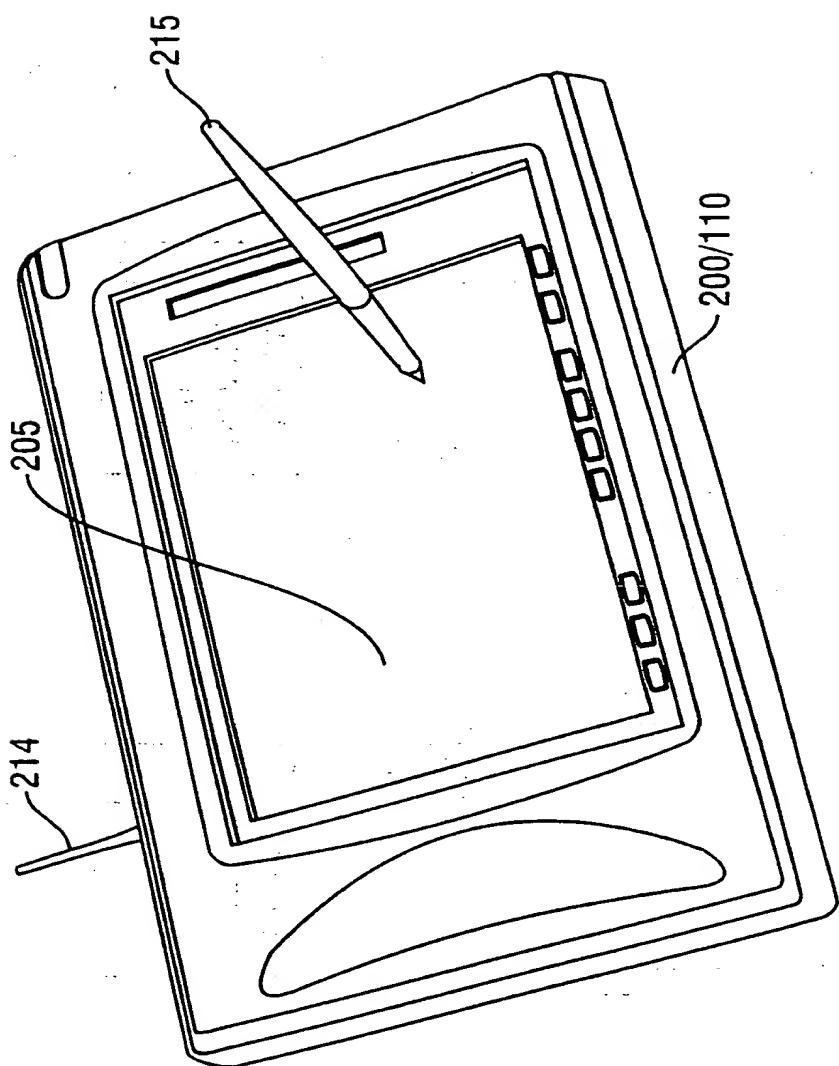


FIG. 2

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<input checked="" type="checkbox"/> Sales Manager <input type="checkbox"/> Show script <input type="checkbox"/> Close prop									
<input type="checkbox"/> *GRT <input type="checkbox"/> WAN <input type="checkbox"/> SEL <input type="checkbox"/> PRO <input type="checkbox"/> DEN <input type="checkbox"/> TRA <input type="checkbox"/> SER <input type="checkbox"/> WRI <input type="checkbox"/> CBI <input type="checkbox"/> SOL <input type="checkbox"/> DLR <input type="checkbox"/> DEL									
<input type="checkbox"/> Manager									
Name <input type="text"/> OLSEN, CATHERINE <input type="text"/> Title <input type="text"/> MISS Address <input type="text"/> OLSEN, CATHERINE <input type="text"/> Company <input type="text"/> <input type="text"/> <input type="text"/>									
City <input type="text"/> MISSOURI CITY <input type="text"/> State <input type="checkbox"/> TX <input type="text"/> Zip <input type="text"/> 77459 County <input type="text"/> FORT BEND <input type="text"/> Country <input type="text"/> United States									
Phones <input type="text"/> Home <input type="text"/> (713)660-7385 <input type="text"/> Work <input type="text"/> (800)999-6348 <input type="text"/> Extension <input type="text"/> 102 Pager <input type="text"/> <input type="text"/> Cel <input type="text"/> <input type="text"/> Fax <input type="text"/> (713)827-1200									
Employer <input type="text"/> THE CONTINUUM <input type="text"/> Occupation <input type="text"/> PROGRAMMER <input type="text"/>									
Prospective Type <input type="text"/> First time <input type="text"/> Advertising source <input type="text"/> SERVC CUST <input type="text"/> INF									
<input type="checkbox"/> Prospect info <input type="checkbox"/> Prospect personal data <input type="checkbox"/> Co-buyer data <input type="checkbox"/> Prospect wants <input type="checkbox"/> Trade-in <input type="checkbox"/> Trade-in appraisal <input type="checkbox"/> Vehicle search <input type="checkbox"/> S <input type="checkbox"/> □ <input type="checkbox"/> △									
<input type="text"/> WAN 0:32 <input type="text"/> 4:44 <input type="text"/> 412496 Miss Catherine Olsen <input type="text"/>									

FIG. 3

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<input checked="" type="checkbox"/> Sales Manager		<input type="checkbox"/> Manager	
<input type="checkbox"/> Show script		<input type="checkbox"/> Close prosop	
<input type="checkbox"/> *GRT <input type="checkbox"/> WAN <input type="checkbox"/> SEL <input type="checkbox"/> PRO <input type="checkbox"/> DEN <input type="checkbox"/> TRA <input type="checkbox"/> SER <input type="checkbox"/> WRI <input type="checkbox"/> CBI <input type="checkbox"/> SOL <input type="checkbox"/> DLR <input type="checkbox"/> DEL			
Name <input type="text"/> OLSEN, CATHERINE		SSN <input type="text"/>	
Nickname <input type="text"/> CATHY		Driver lic <input type="text"/> 102654852 State <input type="text"/> TX	
Age <input type="text"/> 25-39		Birthday <input type="text"/> 1/1/1961 Homeowner <input type="checkbox"/> Yes <input type="checkbox"/> Class Woman	
Internet address <input type="text"/>			
Spouse name <input type="text"/> MIKE		Birthday <input type="text"/> Spouse SSN <input type="text"/>	
Hobbies <input type="text"/> BOATING, CAMPING, GARDENING		Referred by <input type="text"/>	
Children <input type="text"/> MIKEY		<input type="checkbox"/> <input type="checkbox"/> <input type="checkbox"/> <input type="checkbox"/> <input type="checkbox"/> <input type="checkbox"/>	
Trade <input type="text"/> YES		2A/2N <input type="text"/> #PASS <input type="text"/>	
Note <input type="text"/> WON'T MAKE DECISION WITHOUT SPUSE			
PER			
<input type="checkbox"/> Prospect info <input type="checkbox"/> Prospect personal data <input type="checkbox"/> Co-buyer data <input type="checkbox"/> Prospect wants <input type="checkbox"/> Trade-in <input type="checkbox"/> Trade-in appraisal <input type="checkbox"/> Vehicle search <input type="checkbox"/> <input type="checkbox"/> <input type="checkbox"/>			
WAN 0.32		6:53 412496 Miss Catherine "Cathy" Olsen	

FIG. 4

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<input checked="" type="checkbox"/> Sales Manager <input type="checkbox"/> Show script <input type="checkbox"/> Show script		<input type="checkbox"/> Manager	
<input type="checkbox"/> *GRT <input type="checkbox"/> WAN		<input type="checkbox"/> SEL <input type="checkbox"/> PRO <input type="checkbox"/> DEN <input type="checkbox"/> TRA <input type="checkbox"/> SER <input type="checkbox"/> WRI <input type="checkbox"/> CBI <input type="checkbox"/> SOL <input type="checkbox"/> DLR <input type="checkbox"/> DEL	
Name <input type="text" value="OLSEN, MIKE"/>		Title <input type="checkbox"/> Mr <input type="checkbox"/> SSN <input type="text"/>	
Address <input type="text" value="12334 KIOWA RIVER"/>		<input type="text"/>	
<input type="text"/>		<input type="text"/>	
City <input type="text" value="MISSOURI CITY"/>		State <input type="checkbox"/> TX <input type="checkbox"/> Zip <input type="text" value="77459"/>	
County <input type="text" value="FORT BEND"/>		Country <input type="text" value="United States"/>	
Phones Home <input type="text" value="(713)660-7385"/>		Work <input type="text"/>	
<input type="text"/>		Extension <input type="text"/>	
Employer <input type="text"/>		<input type="text"/>	
Occupation <input type="text"/>		<input type="text"/>	
Driver lic. <input type="text"/>		State <input type="checkbox"/> Birthday <input type="text"/>	
<input type="checkbox"/> Prospect info <input type="checkbox"/> Prospect personal data <input type="checkbox"/> Co-buyer data <input type="checkbox"/> Prospect wants <input type="checkbox"/> Trade-in <input type="checkbox"/> Trade-in appraisal <input type="checkbox"/> Vehicle search <input type="checkbox"/> S <input type="checkbox"/> <input type="checkbox"/> <input type="checkbox"/>			
<input type="text" value="WAN 0:32"/>		<input type="text" value="8.04"/>	
<input cathy"="" olsen"="" type="text" value="412496 Miss Catherine "/>		<input type="text"/>	

FIG. 5

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Sales Manager		Manager									
Show script	Close prop										
*GRT	WAN	SEL	PRO	DEN	TRA	SER	WRI	CBI	SOL	DLR	DEL
New/Used	New	Low year	1997	High year	1997	Car/Truck	Car	Transmission		Air cond.	
Make	FORD					Engine		No. of cyl.			
Series						Fuel type					
Model #						Principal driver		Age			
Vehicle Type		Seating capacity		Body							
		<input type="checkbox"/> 2	<input type="checkbox"/> 7	<input type="checkbox"/> 2 door							
		<input type="checkbox"/> 4	<input type="checkbox"/> 8	<input type="checkbox"/> 3 door							
		<input type="checkbox"/> 5	<input type="checkbox"/> 12	<input type="checkbox"/> 4 door							
		<input type="checkbox"/> 6		<input type="checkbox"/> Convertible							
Class		Group		Drive							
		<input type="checkbox"/> Luxury	<input type="checkbox"/> Full size	<input type="checkbox"/> FWD							
		<input type="checkbox"/> Sport	<input type="checkbox"/> Mid size	<input type="checkbox"/> RWD							
		<input type="checkbox"/> Standard	<input type="checkbox"/> Small	<input type="checkbox"/> AWD							
				<input type="checkbox"/> 4WD							
WAN											
Prospect info \ Prospect personal data \ Co-buyses data \ Prospect wants \ Trade-in \ Trade-in appraisal \ Vehicle search \ S \ □ ▷											
WAN 0:32	10:31	412496 Miss Catherine "Cathy" Olsen									

FIG. 6

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<input checked="" type="checkbox"/> Sales Manager		<input type="checkbox"/> Manager										
<input type="checkbox"/> Show script		<input type="checkbox"/> Close prop										
<input type="checkbox"/> *GRT		<input type="checkbox"/> WAN	<input type="checkbox"/> SEL	<input type="checkbox"/> PRO	<input type="checkbox"/> DEN	<input type="checkbox"/> TRA	<input type="checkbox"/> SER	<input type="checkbox"/> WRI	<input type="checkbox"/> CBI	<input type="checkbox"/> SOL	<input type="checkbox"/> DLR	<input type="checkbox"/> DEL
No trade? <input type="checkbox"/>		VIN <input type="checkbox"/>		Mfg <input type="checkbox"/>								
Year <input type="checkbox"/> 1995		Make <input type="checkbox"/> FORD		Model <input type="checkbox"/> TAURUS								
Series <input type="checkbox"/>		Body <input type="checkbox"/>		Color <input type="checkbox"/>								
Color group <input type="checkbox"/>		Transmission <input type="checkbox"/> AT		Engine <input type="checkbox"/> 6CY								
Car/Truck <input type="checkbox"/> Car		Air cond. <input type="checkbox"/>		No. of cyl. <input type="checkbox"/> 6								
Condition <input type="checkbox"/> GOOD		Fuel type <input type="checkbox"/> Unleaded		Odometer <input type="checkbox"/> 67000								
Balance due <input type="checkbox"/> 2500 to <input type="checkbox"/> FMCC		ACV <input type="checkbox"/> 9000		Gross value <input type="checkbox"/> 9000								
Prospect info <input type="checkbox"/>		Prospect personal data <input type="checkbox"/>		Co-buyses data <input type="checkbox"/>		Prospect wants <input type="checkbox"/>		Trade-in <input type="checkbox"/>		Trade-in appraisal <input type="checkbox"/>		<input type="checkbox"/> Vehicle search <input type="checkbox"/> S <input type="checkbox"/> □ <input type="checkbox"/> △
WAN 0:32 <input type="checkbox"/>		20:55 <input type="checkbox"/>		412496 <input type="checkbox"/>		Miss Catherine "Cathy" Olsen <input type="checkbox"/>						

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<input checked="" type="checkbox"/> Sales Manager	<input type="checkbox"/> Manager
<input type="checkbox"/> Show script	<input type="checkbox"/> Close prop
<input type="checkbox"/> * GRT <input type="checkbox"/> WAN <input type="checkbox"/> SEL <input type="checkbox"/> PRO <input type="checkbox"/> DEN <input type="checkbox"/> TRA <input type="checkbox"/> SER <input type="checkbox"/> WRI <input type="checkbox"/> CBI <input type="checkbox"/> SOL <input type="checkbox"/> DLR <input type="checkbox"/> DEL	
<input type="checkbox"/> Print	
Print trade-in appraisal at station <input type="checkbox"/>	
Verbal request for trade appraisal made to <input type="checkbox"/> THOMPSON	
<input type="checkbox"/> APP	
<input type="checkbox"/> Prospect info \ <input type="checkbox"/> Prospect personal data \ <input type="checkbox"/> Co-buyses data \ <input type="checkbox"/> Prospect wants \ <input type="checkbox"/> Trade-in \ <input type="checkbox"/> Trade-in appraisal \ <input type="checkbox"/> Vehicle search \ <input type="checkbox"/> S \ <input type="checkbox"/> □ \ <input type="checkbox"/> △	
<input type="checkbox"/> WAN 0:32 <input type="checkbox"/> 21:24 <input type="checkbox"/> 412496 Miss Catherine "Cathy" Olsen	

FIG. 8

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Sales Manager		Manager																																																																																																																																																																																																																																																																																																																																			
Show script	Close pros																																																																																																																																																																																																																																																																																																																																				
*GRT	WAN	SEL	PRO	DEN	TRA	SER	WRI	CBI	SOL	DLR	DEL																																																																																																																																																																																																																																																																																																																										
<table border="1"> <tr> <td colspan="2">Attributes and Price/Payment</td> <td colspan="2">Options</td> <td colspan="8"></td> </tr> <tr> <td colspan="2"> <input type="checkbox"/> New/<input type="checkbox"/> Used         </td> <td colspan="2"> <input type="checkbox"/> Vehicle Type           <table border="1"> <tr><td><input type="checkbox"/> Car</td></tr> <tr><td><input type="checkbox"/> Sport Utility</td></tr> <tr><td><input type="checkbox"/> Truck</td></tr> <tr><td><input type="checkbox"/> Van</td></tr> </table> </td> <td colspan="8"> <input type="checkbox"/> Body           <table border="1"> <tr><td><input type="checkbox"/> 2 door</td></tr> <tr><td><input type="checkbox"/> 3 door</td></tr> <tr><td><input type="checkbox"/> 4 door</td></tr> <tr><td><input type="checkbox"/> Convertible</td></tr> </table> </td> </tr> <tr> <td colspan="2"> <input type="checkbox"/> Low year           <table border="1"> <tr><td><input type="checkbox"/> 1997</td></tr> </table> </td> <td colspan="2"> <input type="checkbox"/> Seating capacity           <table border="1"> <tr><td><input type="checkbox"/> 2</td></tr> <tr><td><input type="checkbox"/> 4</td></tr> <tr><td><input type="checkbox"/> 5</td></tr> <tr><td><input type="checkbox"/> 6</td></tr> <tr><td><input type="checkbox"/> 7</td></tr> <tr><td><input type="checkbox"/> 8</td></tr> <tr><td><input type="checkbox"/> 12</td></tr> </table> </td> <td colspan="8"> <input type="checkbox"/> Drive           <table border="1"> <tr><td><input type="checkbox"/> FWD</td></tr> <tr><td><input type="checkbox"/> RWD</td></tr> <tr><td><input type="checkbox"/> AWD</td></tr> <tr><td><input type="checkbox"/> 4WD</td></tr> </table> </td> </tr> <tr> <td colspan="2"> <input type="checkbox"/> High year           <table border="1"> <tr><td><input type="checkbox"/> 1997</td></tr> </table> </td> <td colspan="2"> <input type="checkbox"/> Group           <table border="1"> <tr><td><input type="checkbox"/> Full size</td></tr> <tr><td><input type="checkbox"/> Mid size</td></tr> <tr><td><input type="checkbox"/> Small</td></tr> </table> </td> <td colspan="8"></td> </tr> <tr> <td colspan="2"> <input type="checkbox"/> Make           <table border="1"> <tr><td><input type="checkbox"/> FORD</td></tr> </table> </td> <td colspan="2"> <input type="checkbox"/> Class           <table border="1"> <tr><td><input type="checkbox"/> Luxury</td></tr> <tr><td><input type="checkbox"/> Sport</td></tr> <tr><td><input type="checkbox"/> Standard</td></tr> </table> </td> <td colspan="8"></td> </tr> <tr> <td colspan="2"> <input type="checkbox"/> Model           <table border="1"> <tr><td><input type="checkbox"/> MUSTANG</td></tr> </table> </td> <td colspan="2"> <input type="checkbox"/> Series           <table border="1"> <tr><td><input type="checkbox"/></td></tr> </table> </td> <td colspan="8"></td> </tr> <tr> <td colspan="2"> <input type="checkbox"/> Body           <table border="1"> <tr><td><input type="checkbox"/></td></tr> </table> </td> <td colspan="2"> <input type="checkbox"/> Body           <table border="1"> <tr><td><input type="checkbox"/></td></tr> </table> </td> <td colspan="8"></td> </tr> <tr> <td colspan="12"> <table border="1"> <tr> <td colspan="2"> <input type="checkbox"/> Payment from           <table border="1"> <tr><td><input type="checkbox"/> 500</td></tr> </table> </td> <td colspan="2"> <input type="checkbox"/> to           <table border="1"> <tr><td><input type="checkbox"/> 500</td></tr> </table> </td> <td colspan="2"> <input type="checkbox"/> Tier A           <table border="1"> <tr><td><input type="checkbox"/></td></tr> </table> </td> <td colspan="8"></td> </tr> <tr> <td colspan="12"> <input type="checkbox"/> List price from           <table border="1"> <tr><td><input type="checkbox"/></td></tr> </table> </td> </tr> </table> </td> </tr> <tr> <td colspan="12"> <input type="checkbox"/> Search         </td> </tr> <tr> <td colspan="12"> <input type="checkbox"/> Clear screen         </td> </tr> <tr> <td colspan="12"> <input type="checkbox"/> SEL         </td> </tr> <tr> <td colspan="12"> <input type="checkbox"/> Prospect info         </td> </tr> <tr> <td colspan="12"> <input type="checkbox"/> Prospect personal data         </td> </tr> <tr> <td colspan="12"> <input type="checkbox"/> Co-buyers data         </td> </tr> <tr> <td colspan="12"> <input type="checkbox"/> Prospects wants         </td> </tr> <tr> <td colspan="12"> <input type="checkbox"/> Trade-in         </td> </tr> <tr> <td colspan="12"> <input type="checkbox"/> Trade-in appraisal         </td> </tr> <tr> <td colspan="12"> <input type="checkbox"/> Vehicle search         </td> </tr> <tr> <td colspan="12"> <input type="checkbox"/> S/ <input type="checkbox"/> D         </td> </tr> <tr> <td colspan="12"> <input type="checkbox"/> WAN         </td> </tr> <tr> <td colspan="12"> <input type="checkbox"/> 0:32 [ 22:33 ] 412496 Miss Catherine "Cathy" Olsen         </td> </tr> </table>												Attributes and Price/Payment		Options										<input 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FIG. 9

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Sales Manager		Manager											
<input type="button" value="Show script"/>	<input type="button" value="Close prosp"/>	<input type="button" value="Attributes and Price/Payment"/> <input type="button" value="Options"/>											
<input type="button" value="SEL"/> <input type="button" value="WAN"/> <input type="button" value="SEL"/> <input type="button" value="PRO"/> <input type="button" value="DEN"/> <input type="button" value="TRA"/> <input type="button" value="SER"/> <input type="button" value="WRI"/> <input type="button" value="CBI"/> <input type="button" value="SOL"/> <input type="button" value="DLR"/> <input type="button" value="DEL"/>		<input type="button" value="Color group"/> <input type="button" value="Color code"/> <input type="button" value="Trim"/> <input type="button" value="Transmission"/> <input type="button" value="Engine"/> <input type="button" value="Quick spec"/>											
<input type="button" value="New"/> <input type="button" value="Used"/>		<input type="button" value="Include options"/>		<input type="button" value="Exclude options"/>		<input type="button" value="Mileage from"/> <input type="button" value="to"/>		<input type="button" value="Include on order"/>		<input type="button" value="Spi#"/>			
<input type="button" value="Low year"/> <input type="button" value="1997"/>		<input type="button" value="High year"/> <input type="button" value="1997"/>		<input type="button" value="Make"/> <input type="button" value="FORD"/>		<input type="button" value="Make"/> <input type="button" value="MUSTANG"/>		<input type="button" value="Series"/>		<input type="button" value="Body"/>			
<input type="button" value="Search"/>		<input type="button" value="Clear screen"/>		<input type="button" value="Prospect info"/> <input type="button" value="Co-huyes data"/> <input type="button" value="Prospect wants"/> <input type="button" value="Trade-in"/> <input type="button" value="Trade-in appraisal"/> <input type="button" value="Vehicle search"/> <input type="button" value="SEL"/>									
<input type="button" value="WAN 0:32"/> <input type="button" value="22:47"/> <input cathy"="" olsen"="" type="button" value="412496 Miss Catherine "/>													

FIG. 10

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Vehicles found							
00031456	97 FORD	MUSTANG	2DR CNV	1FALP4443VF201267	R		
00031705	97 FORD	MUSTANG	2DR CNV	1FALP4448VF208280	R		
CJB00011	97 FORD	MUSTANG	2DR CPE	1FALP42X0VF120241	F		
CJB00010	97 FORD	MUSTANG	2DR CPE	1FALP42X4VF116208	F		

Vehicle: New 1997 FORD MUSTANG 2DR CNV 3 P44	Cost: Calc: 21752 Acct: 100
List: 23590 Calc: 23945	GW: Whbse: 101.3
Mileage: 12 Sp#: 12	Trim: SADDLE CLOTH BUCKETS
Color: RIO RED TINTED CLEARCOAT	Trans: AUTO OVERDRIVE TRANSMISSION
Engine: ENGINE-3.8L EFI V6	In stock: 2 Location: FORD SALES
Status: (R) READY TO SELL	
Package: 243A Options: 572 63A 143 217 132 994 44U M 12H 20A	

FIG. 11

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Sales Manager		X	
Show script	Close pros	Manager	
<input type="checkbox"/> *GRT <input type="checkbox"/> WAN <input type="checkbox"/> SEL <input type="checkbox"/> PRO <input type="checkbox"/> DEN <input type="checkbox"/> TRA <input type="checkbox"/> SER <input type="checkbox"/> WRI <input type="checkbox"/> CBI <input type="checkbox"/> SOL <input type="checkbox"/> DLR <input type="checkbox"/> DEL			
Description <input type="text" value="1997 FORD MUSTANG"/> 2DR CNV ED		<input type="checkbox"/> Hold for salesman	
Stock number <input type="text" value="00031456"/> VIN <input type="text" value="1FALP4443WF201267"/>		<input type="checkbox"/> VEH	
List <input type="text" value="23945"/> Price <input type="text" value="23000"/>		<input type="checkbox"/> a Co-buys data <input type="checkbox"/> Prospect wants <input type="checkbox"/> Trade-in <input type="checkbox"/> Trade-in appraisal <input type="checkbox"/> Vehicle search <input type="checkbox"/> Selected vehicle <input type="checkbox"/> Credit Bureau Inquiry <input type="checkbox"/> P <input type="checkbox"/> □ <input type="checkbox"/> □	
<input type="checkbox"/> WAN 0:32 <input type="checkbox"/> 4:44 <input type="checkbox"/> 412496 Miss Catherine Olsen			

FIG. 12

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<input checked="" type="checkbox"/> Sales Manager											
<input type="checkbox"/> Show script <input checked="" type="checkbox"/> Close prosop											
<input type="checkbox"/> *GRT <input type="checkbox"/> WAN <input type="checkbox"/> SEL <input type="checkbox"/> PRO <input type="checkbox"/> DEN <input type="checkbox"/> TRA <input type="checkbox"/> SER <input type="checkbox"/> WRI <input type="checkbox"/> CBI <input type="checkbox"/> SOL <input type="checkbox"/> DLR <input type="checkbox"/> DEL											
<input checked="" type="checkbox"/> Manager											
<input type="checkbox"/> Bureau to be inquired: CBI <input checked="" type="checkbox"/> Yes <input type="checkbox"/> TRU <input checked="" type="checkbox"/> Yes <input type="checkbox"/> TRW <input type="checkbox"/> No <input type="checkbox"/> Auto print <input type="checkbox"/> No <input type="checkbox"/> Auto flush <input checked="" type="checkbox"/> No											
Options: CBI: <input type="checkbox"/> SSN Search <input checked="" type="checkbox"/> Yes <input type="checkbox"/> Phone code <input checked="" type="checkbox"/> 5 <input type="checkbox"/> Report options <input type="checkbox"/> <input type="checkbox"/> TRU: <input type="checkbox"/> SSN Search <input checked="" type="checkbox"/> No <input type="checkbox"/> Phone code <input checked="" type="checkbox"/> 3 <input type="checkbox"/> Report options <input checked="" type="checkbox"/> 012 <input type="checkbox"/> TRW: <input type="checkbox"/> SSN Search <input checked="" type="checkbox"/> No <input type="checkbox"/> Phone code <input checked="" type="checkbox"/> 2 <input type="checkbox"/> Credit phone list <input checked="" type="checkbox"/> No											
Last <input type="checkbox"/> OLSEN <input type="checkbox"/> First <input type="checkbox"/> CATHERINE <input type="checkbox"/> Middle <input type="checkbox"/> Title <input type="checkbox"/> SSN <input type="checkbox"/> Employer <input type="checkbox"/> THE CONTINUUM <input type="checkbox"/> Joint inquiry <input checked="" type="checkbox"/> Spouse's first name <input type="checkbox"/> MIKE <input type="checkbox"/> SSN <input type="checkbox"/>											
Current address: Number <input type="checkbox"/> 12334 <input type="checkbox"/> Street <input type="checkbox"/> KIOWA RIVER <input type="checkbox"/> City <input type="checkbox"/> MISSOURI CITY <input type="checkbox"/> State <input type="checkbox"/> TX <input type="checkbox"/> ZIP <input type="checkbox"/> 77453 <input type="checkbox"/> Route <input type="checkbox"/> Box <input type="checkbox"/>											
Former address: Number <input type="checkbox"/> Street <input type="checkbox"/> City <input type="checkbox"/> <input type="checkbox"/> State <input type="checkbox"/> ZIP <input type="checkbox"/> Route <input type="checkbox"/> Box <input type="checkbox"/>											
<input type="checkbox"/> Co-buyses data <input type="checkbox"/> Prospect wants <input type="checkbox"/> Trade-in appraisal <input type="checkbox"/> Vehicle search <input type="checkbox"/> Selected vehicle <input type="checkbox"/> Credit Bureau Inquiry <input checked="" type="checkbox"/> <input type="checkbox"/> <input type="checkbox"/> CBI											
<input type="checkbox"/> WAN 0:32 <input type="checkbox"/> 24:00 <input type="checkbox"/> 412496 Miss Catherine "Cathy" Olsen <input type="checkbox"/>											
<input type="checkbox"/> Send <input type="checkbox"/>											

FIG. 13

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<input checked="" type="checkbox"/> Manager											
<input type="checkbox"/> Sales Manager											
<input type="checkbox"/> Show script <input type="checkbox"/> Close prop											
<input type="checkbox"/> *GRT <input type="checkbox"/> WAN <input type="checkbox"/> SEL <input type="checkbox"/> PRO <input type="checkbox"/> DEN <input type="checkbox"/> TRA <input type="checkbox"/> SER <input type="checkbox"/> WRI <input type="checkbox"/> CBI <input type="checkbox"/> SOL <input type="checkbox"/> DLR <input type="checkbox"/> DEL											
Stock number <input type="text" value="00031456"/> 1997 FORD MUSTANG 2DR CUV E8											
Customer Offer											
<input checked="" type="checkbox"/> 01-FINANCE <input type="checkbox"/> 10-BALLOON <input checked="" type="checkbox"/> 01-LEASE <input checked="" type="checkbox"/> CASH											
Management Offer (display only)											
<input checked="" type="checkbox"/> 10-BALLOON <input checked="" type="checkbox"/> 01-LEASE <input checked="" type="checkbox"/> CASH											
Price <input type="text" value="23000.00"/> Estimated <input type="text" value="9000.00"/> Estimated Trade value <input type="text" value="9000.00"/> Estimated Trade payoff <input type="text" value="2500.00"/>											
Down pmt <input type="text" value="1200.00"/> Rebate <input type="text"/>											
Term <input type="text" value="43"/> APR <input type="text" value="10.00"/> Payment <input type="text"/>											
Rebate <input type="text"/>											
Payment <input type="text" value="500.00"/> Balloon <input type="text"/>											
Submit to Power Workstation # <input type="text" value="W3J"/>											
Comment <input type="text"/>											
Quote has been logged <input type="checkbox"/> Buyer's Order <input type="text"/>											
Last activity: Counter-offer received <input type="checkbox"/> Start over <input type="checkbox"/> Counter-offers <input type="text"/>											
Comment <input type="text"/>											
<input type="checkbox"/> Trade-in <input type="checkbox"/> Trade-in appraisal <input type="checkbox"/> Vehicle search <input type="checkbox"/> Selected vehicle <input type="checkbox"/> Credit Bureau Inquiry <input type="checkbox"/> Prospect offer <input type="checkbox"/> Sold <input type="checkbox"/> Delivered <input type="checkbox"/> OFF <input type="checkbox"/> □ <input type="checkbox"/> △											
WAN 0:32 <input type="checkbox"/> 27:34 <input type="checkbox"/> 412496 Miss Catherine "Cathy" Olsen <input type="text"/>											

FIG. 14

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<input checked="" type="checkbox"/> Sales Manager													
<input type="checkbox"/> Show script <input type="checkbox"/> Close pros													
<table border="1"> <tr> <td>*GRT</td> <td>WAN</td> <td>SEL</td> <td>PRO</td> <td>DEN</td> <td>TRA</td> <td>SER</td> <td>WRI</td> <td>CBI</td> <td>SOL</td> <td>DLR</td> <td>DEL</td> </tr> </table>		*GRT	WAN	SEL	PRO	DEN	TRA	SER	WRI	CBI	SOL	DLR	DEL
*GRT	WAN	SEL	PRO	DEN	TRA	SER	WRI	CBI	SOL	DLR	DEL		
<table border="1"> <tr> <td>Name</td> <td>OLSEN, CATHERINE</td> </tr> </table>		Name	OLSEN, CATHERINE										
Name	OLSEN, CATHERINE												
<table border="1"> <tr> <td>Prospect</td> <td>412496</td> </tr> </table>		Prospect	412496										
Prospect	412496												
<table border="1"> <tr> <td>VIN</td> <td></td> </tr> </table>		VIN											
VIN													
<table border="1"> <tr> <td>Stock</td> <td></td> </tr> </table>		Stock											
Stock													
<table border="1"> <tr> <td>Description</td> <td></td> </tr> </table>		Description											
Description													
<table border="1"> <tr> <td>This unit is sold</td> <td><input type="checkbox"/> Yes</td> </tr> </table>		This unit is sold	<input type="checkbox"/> Yes										
This unit is sold	<input type="checkbox"/> Yes												
<table border="1"> <tr> <td colspan="12">SOL</td> </tr> </table>		SOL											
SOL													
<table border="1"> <tr> <td colspan="12"> <input type="checkbox"/> Trade-in <input type="checkbox"/> Trade-in appraisal <input type="checkbox"/> Vehicle search <input type="checkbox"/> Selected vehicle <input type="checkbox"/> Credit Bureau Inquiry <input type="checkbox"/> Prospect offer <input type="checkbox"/> Sold <input type="checkbox"/> Delivered <input type="checkbox"/> <input type="checkbox"/> <input type="checkbox"/> </td> </tr> </table>		<input type="checkbox"/> Trade-in <input type="checkbox"/> Trade-in appraisal <input type="checkbox"/> Vehicle search <input type="checkbox"/> Selected vehicle <input type="checkbox"/> Credit Bureau Inquiry <input type="checkbox"/> Prospect offer <input type="checkbox"/> Sold <input type="checkbox"/> Delivered <input type="checkbox"/> <input type="checkbox"/> <input type="checkbox"/>											
<input type="checkbox"/> Trade-in <input type="checkbox"/> Trade-in appraisal <input type="checkbox"/> Vehicle search <input type="checkbox"/> Selected vehicle <input type="checkbox"/> Credit Bureau Inquiry <input type="checkbox"/> Prospect offer <input type="checkbox"/> Sold <input type="checkbox"/> Delivered <input type="checkbox"/> <input type="checkbox"/> <input type="checkbox"/>													
<table border="1"> <tr> <td>WAN 0:36</td> <td>29:29</td> <td>412496</td> <td>Miss Catherine "Cathy" Olsen</td> <td colspan="8"></td> </tr> </table>		WAN 0:36	29:29	412496	Miss Catherine "Cathy" Olsen								
WAN 0:36	29:29	412496	Miss Catherine "Cathy" Olsen										

FIG. 15

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<input checked="" type="checkbox"/> Sales Manager <input type="checkbox"/> Show script <input type="checkbox"/> Close prosp		<input type="checkbox"/> Manager													
<table border="1"> <tr> <td>*GRT</td> <td>WAN</td> <td>SEL</td> <td>PRO</td> <td>DEN</td> <td>TRA</td> <td>SER</td> <td>WRI</td> <td>CBI</td> <td>SOL</td> <td>DLR</td> <td>DEL</td> </tr> </table>				*GRT	WAN	SEL	PRO	DEN	TRA	SER	WRI	CBI	SOL	DLR	DEL
*GRT	WAN	SEL	PRO	DEN	TRA	SER	WRI	CBI	SOL	DLR	DEL				
Name <input type="text" value="OLSEN, CATHERINE"/>		Prospect <input type="text" value="412496"/>		VIN <input type="text"/>		Stock <input type="text"/>		Description <input type="text"/>		This unit is delivered <input type="checkbox"/>					
S \ Trade-in \ Trade-in appraisal \ Vehicle search \ Selected vehicle \ Credit Bureau Inquiry \ Prospect offer \ Sold \ Delivered <input type="checkbox"/> <input checked="" type="checkbox"/> <input type="checkbox"/>															
<input type="text" value="WAN 0:36"/>		<input type="text" value="29:29"/>		<input type="text" value="412496"/>		<input cathy"="" olsen"="" type="text" value="Miss Catherine "/>		<input type="text"/>		<input type="text"/>					

FIG. 16

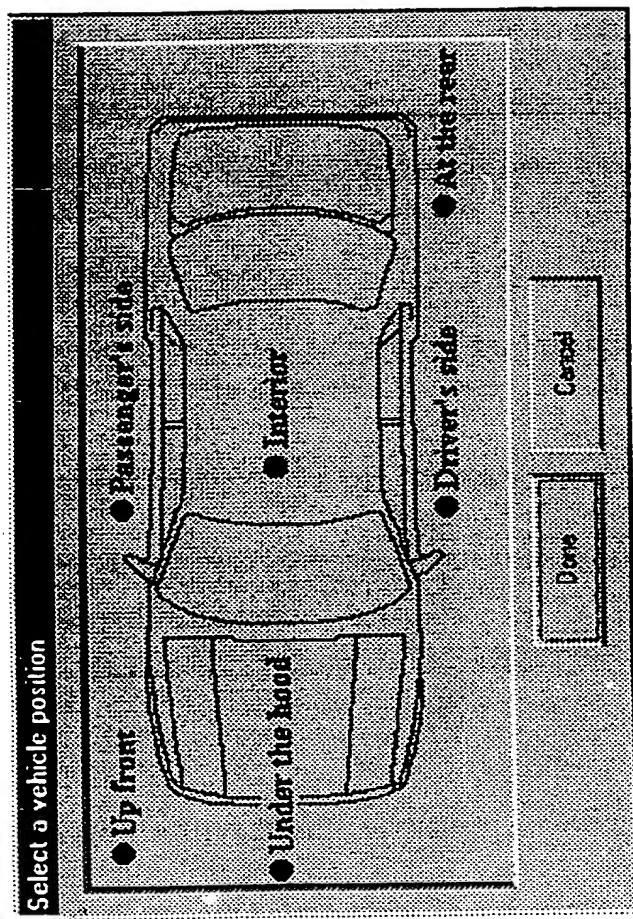


FIG. 17

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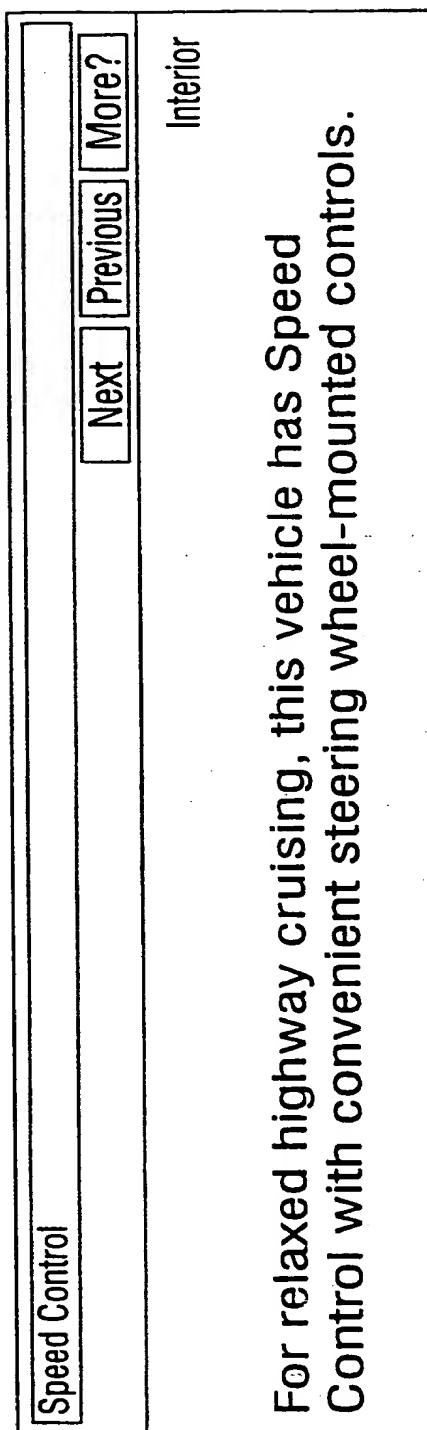


FIG. 18

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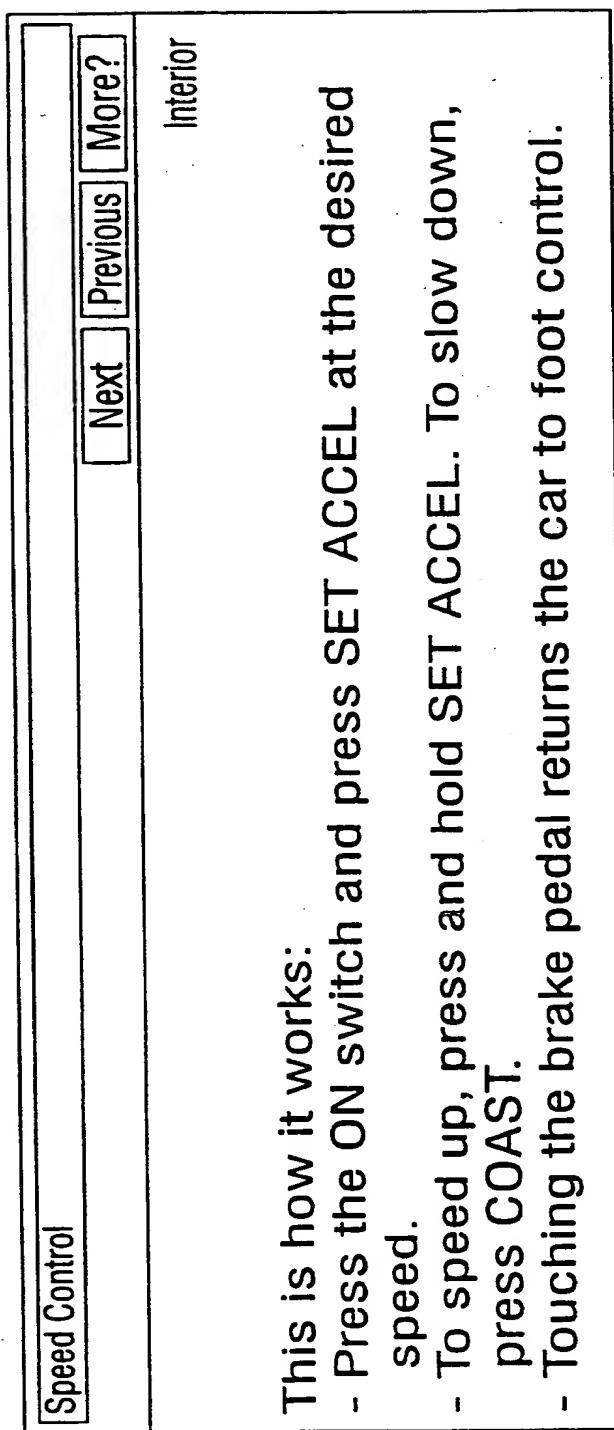


FIG. 19

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Sales Manager	<input checked="" type="checkbox"/>
Show script	<input type="checkbox"/>
Manager	<input type="checkbox"/>
<p>*Name <input type="text" value="OLSEN, CATHERINE"/></p> <p>Phones <input type="text" value="Home (713)660-7385"/> <input type="text" value="Work (800)999-6348"/> Extension <input type="text" value="102"/></p> <p>Beback date <input type="text"/> Time <input type="text"/></p> <p>*Tickle date <input type="text" value="9/3/1997"/> Disposition <input type="text"/></p> <p>*Prospect type <input type="text" value="First time"/> *Advertising source <input type="text" value="SERVC CUST"/></p> <p>*Up <input type="checkbox"/></p>	
<p>Main Menu <input type="checkbox"/></p> <p>Cancel <input type="checkbox"/></p> <p>BEB <input type="checkbox"/></p> <p><input type="checkbox"/> <input type="checkbox"/></p>	
<p>WAN 0:05 <input type="checkbox"/> 38:10 <input type="checkbox"/> 412496 Miss Catherine "Cathy" Olsen <input type="text"/></p>	

\* These are the minimum required fields necessary to close  
the prospect and return to the Main menu.

FIG. 20

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<input type="button" value="Top"/>	<input type="button" value="Previous"/>
<p>Welcome to ABC Motors, How may i assist you today?</p> <p><input type="button" value="We need a new car"/> <input type="button" value="We're just looking"/> <input type="button" value="How much is this car"/></p>	

FIG. 21

PRINT 415 RECORDS - REPORT 022		RUN 09/10/97 15:35:40 PAGE 1			
TRN SEQ	SCRIPT TEXT	ANSWER	GOTO PUT DATA	IN FIELD	STEP SEQ
	TYPE: Let's get you started on the credit application. Fill in all of the lines on both sides of the page. When you are done, you and I will go over it to make sure it is complete.	Continue			CBI 0010
	TYPE: While you're filling that out, I'll need to see your driver's license and I need your social security number.	Continue			CBI 0030
	TYPE: Enter Social Security number:	Continue			CBI 0040
	TYPE: Enter Driver's license number:	Continue	TX		DRIVERSLIST CBI 0050
	TYPE: Enter Driver's license state:	Continue			DRIVERSLICNO CBI 0060
	TYPE: Enter Address. Is it correct on the license?	Continue			DRIVERSLIST CBI 0070
	TYPE: Enter Zip Code. Is it correct on the license?	Continue			BUYERADDR CBI 0080
	TYPE: Enter Zip Code. Is it correct on the license?	Continue			BUYERZIP CBI 0090
	TYPE: That's it. Let's review the credit application, and then, I'll take it to the Business Manager.	Continue			CBI 9999

FIG. 22

## PRINT 415 RECORDS - REPORT 022

STEP SEQ	SCRIPT TEXT	RUN 09/10/97 15:35:40	PAGE- 3
ANSWER	GOTO PUT DATA IN FIELD	STEP SEQ	
1010	When the business manager has finished with your customers, Continue	DEL 0020	
	You will receive a page asking you to come to his office. Take your customers to your office and complete the delivery process.		
	Review contents of the New Vehicle Packet.		
1020	Show your customer where the service write-up area is.	Continue	DEL 0025
	Introduce your customer to a Service Advisor.		
	Give him/her the scheduled maintenance book.		
	Remind him/her of the three free LOF in the front of the book.		
1030	Before introducing the Service Advisor, say: You will be assigned your own personal service advisor. This means that they get to know your vehicles, and they ensure that you are completely satisfied on every visit.	Continue	DEL 0040
	Tell the customer how convenient service's hours are:	Continue	DEL 0040
	Our service department is convenient for both pick-up and drop-off customers. Service is open from 7:30am to 7:30pm, Monday through Friday, and by appointment on Saturday.		
1040	Inspect the vehicle while filling out and reviewing the Ford Quality Commitment Delivery Checklist. Now say: In approximately two to three weeks you will receive a survey like this one from Ford Motor Company. The survey will ask you questions concerning your sales experience at AHC Motors.	Continue	DEL 0050
1050	We take pride in our customer satisfaction rating. Your complete satisfaction is our Number 1 goal. Entice into Ford's Elite Masters Sales Program and part of my compensation is determined by your rating of "2A", which rates your overall purchase/lease experience.	Continue	DEL 0060
1060	and "N", which rates the overall condition of your vehicle at time of delivery.	TEN LESS THAN 10	10 <10
	Do you feel you can rate both those areas as	BUYERMSC2	BUYERMSC2
		DEL 0070	DEL 0080

FIG. 23





... and... THANK YOU for choosing to buy your vehicle from  
ABC Motors. This is only the beginning of  
our business relationship.

... I'll call you in a few days to see if you have any  
questions about your new vehicle and to see how you  
like your new vehicle.

... Hit CONTINUE to begin your next sale.  
Hit CLOSE to exit.

BEB

Continue

DEL 0140

DEL 0150

DEL 0160

DEL 0170

DEL 0180

DEL 0190

DEL 0200

DEL 0210

DEL 0220

DEL 0230

DEL 0240

DEL 0250

DEL 0260

DEL 0270

DEL 0280

DEL 0290

DEL 0300

DEL 0310

DEL 0320

DEL 0330

DEL 0340

DEL 0350

DEL 0360

DEL 0370

DEL 0380

DEL 0390

FIG. 26

STEP	SEQ	TEXT	ANSWER	GOTO PUT DATA	IN FIELD	STEP SEQ
1	1	Let me start the car, and I'll show you more about the interior of this vehicle.	OK No time Not buying			DEM 0140 DEM 0110 DEM 0120
2	1	OK	No really, no time			DEM 0140 DEM 0190
3	1	OK	Continue			DEM 0111
4	1	That's a smart way to shop for vehicles. Since you are just beginning you'll scratch for a new vehicle, you will want to start searching & feel for what you like and don't like in a vehicle. The best way to do just that is to take the car for a spin a few minutes.	OK No			DEM 0140 DEM 0110
5	1	OK	Continue			DEM 0111
6	1	It may decide you really like the vehicle. Or you may decide you need to come back and look at it again when you're ready to buy. Either way, you will have made the start in your decision making process.	OK No time Not ready Not buying			DEM 0140 DEM 0110 DEM 0121 DEM 0140
7	1	OK	Continue			DEM 0111
8	1	It's time to explain or review one or more of the different features involved in the product presentation.	OK No time Not ready Not buying			DEM 0140 DEM 0110 DEM 0121 DEM 0140
9	1	OK	Continue			DEM 0111
10	1	It's time to end the block.	OK No really, no time			DEM 0140 DEM 0190
11	1	It's time to end the block.	OK No really, no time			DEM 0140 DEM 0190

become a little more familiar with this vehicle.

DEM (17) Not Ready:

- I understand how you feel.
- I have felt that way myself when I first began to search for a new car.
- But I found that by driving each vehicle that interested me, I was better able to define what I did and didn't like and it actually made my search easier.

DEM (17) Ready:

DEM 0200  
DEM 0190

Really, not ready

DEM (17) Not buying today: That's fine. Let me show you the  
automobile ride this vehicle offers. No one can make  
you buy a vehicle just for test driving it.

DEM 0200  
DEM 0190

OK

No

FIG. 28

## PRINT 415 RECORDS - REPORT 022

STEP SEQ	SKIFT TEXT	ANSWER	GOTO PUT DATA	IN FIELD	STEP SEQ
145 010	Will let's make an appointment for you to come in and spend a little time in this vehicle. Are You free tonight? How about tomorrow evening? Which is best for you?	OK No			0191 DEM 0191 DEM 1020
146 010	Would that be more convenient for you? Let me mark it in my schedule here.	Continue			APTDATE DEM 0195
147 010	Now, You will call me if something changes on your end, won't you? And I'll do the same for you if something changes on my end. Where can I reach you - or - your answering machine?	Home Phone Work Phone Cell Phone No Phone Given			DEM 0196 DEM 0197 DEM 0198 DEM 0199
148 010	Home phone:	Continue Work# also given	BUYERHOMEPH DEM 0197		DEM 0199 DEM 0198
149 010	Work phone:	Continue Cell# also given	BUYERWORKPH DEM 0198		DEM 0199 DEM 0196
150 010	Cell phone:	Continue Home# also given			DEM 0199 DEM 0196
151 010	What, I'll see you then.	Continue BEB			DEM 9999
152 010	When on the demo ride, be sure to let all drivers take a turn behind the wheel.	Continue			DEM 0199 DEM 0196
153 010	Sit in the back if there is another driver in the group, or she will enjoy the ride more in the passenger seat.				DEM 0220
154 010	I think you'll find you like how this vehicle rides. We'll tell DLR story 1 take it on the highway if you like. First take a right onto the feeder and then take another right at the first street you see.				DEM 0220

FIG. 29



PRINT 415 RECORDS - REPORT 022

TEXTURE (cont'd.)

PRINT 415 RECORDS - REPORT 022

ANSWER

RUN 09/10/97 15:35:40 PAGE= 7

#### INPUT DATA IN FIELD STEP SEQ.

Note the three items the prospect stated he really wants in a vehicle are displayed behind this script. Try to give the prospect a YES response to your questions which **VALIDATES** that the vehicle does meet their wants.

John: This vehicle sure has great response, doesn't it?  
The steering system in this vehicle sure sounds good,  
doesn't it?

Notice the long room, and there's still plenty of room in the back. You'll be able to fit your family or friends in here comfortably, right?

- Uncle's died.  
- Oh, just move on to the next question without responding.  
-----  
Where is the first place you would take your new vehicle?  
Who is the first person you would take for a drive in  
your new vehicle?

Mr. and Mrs. You have a shuttle for our service customers. Do you live  
at work closely?

Well, I'm sure you will still want to make it in for the  
FREE Like, Oil, and Filter changes we include at no  
extra charge.

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FIG.

PRINT 415 RECORDS - REPORT 022

ANSWER	GOTO PUT DATA	IN FIELD	STEP SEQ	RUN 09/10/97 15:35:40	PAGE= 8
We need a new car				GRT 0300	
We're just looking				GRT 0300	
How much is this car?				GRT 0100	
Yes - the exact amount				GRT 0110	
No/Undecided				GRT 0120	
At the right price				GRT 0125	
Yes - here	B	PROSPTYPE	GRT 0130		
Yes - elsewhere				GRT 0305	
No				GRT 0120	
OK				GRT 0300	
Just need a price				GRT 0200	
Well, then let's make sure it's the right car before we price it for you. Because if it's not the car you want, then it doesn't matter what the price is, right?	OK			GRT 0300	
Well, then let's make sure it's the right car before we price it for you. Because if it's not the car you want, then it doesn't matter how great the price is, right?	OK			GRT 0200	
Well, welcome back. So, you've already had a chance to go shopping.	Continue			GRT 1300	
Okay, tell me more about this vehicle. I'll introduce you to our sales manager, who will be able to tell you more about it.	Continue			GRT 1300	
Yes - First	F	PROSPTYPE	GRT 0110		
No - Serviced here	F	PROSPTYPE	GRT 0320		
No - Bought here	F	PROSPTYPE	GRT 0320		
No - Shopped here	B	PROSPTYPE	GRT 0320		
SC	SOURCECODE	SOURCECODE			
2B					
Yes - First	F	PROSPTYPE	GRT 1300		
No - Serviced here	F	PROSPTYPE	GRT 0325		
No - Bought here	F	PROSPTYPE	GRT 0325		
No - Shopped here	B	PROSPTYPE	GRT 0325		

FIG. 32

	SC 2B	SOURCECODE SOURCECODE
GRT 0.310 Let me explain our layout for you. New Cars are in the front. Explorers, Minivans, and New Trucks are on the side of the building. Our Pre-Owned Vehicles are displayed in the adjacent lot.	Continue	GRT 1000
GRT 0.311 Super. Welcome back.	Continue	GRT 1000
GRT 0.311 Welcome back.	Continue	GRT 1300
GRT 0.311 Are you interested in a New Ford product or a	New	WANTNEWUSED GRT 130.

FIG. 33

PRINT 415 RECORDS - REPORT 022		RUN 09/10/97 15:35:40 PAGE= 9	
STEP SEQ	SCRIPT TEXT	ANSWER	GOTO PUT DATA IN FIELD STEP SEQ *
	Pre-Owned vehicle?		
GRT 1310	By the way, I'm....	Pre-Owned Undecided	U WANTNEWUSED WANTNEWUSED
GRT 1311	What's your name? Do you mind if I write that down?	Continue	GRT 1300 GRT 1300
GRT 1305	This computer is great. The owner, Mr. Jones, believes that every customer should be given our best treatment possible and has asked us to use it with each visitor. Is that OK with you?	OK	GRT 1301 GRT 1305
GRT 1310	Mr. Jones has also asked us to conduct a VERY SHORT SURVEY to determine which advertising sources are most effective. Your answers are so important to us that he has asked us to log every response.	Continue	GRT 1310
GRT 1311	First, which advertising source listed here BEST represents the reason you chose to visit our dealership?	Continue	GRT 1320
GRT 1312	Record, what is your ZIP code?	Continue	GRT 1330
GRT 1313	Great. THANK YOU for taking a moment to answer those two questions.	Continue	GRT 1340
GRT 1314	Note: When you hit CONTINUE, this script will disappear. No more scripts will display until you:		GRT 1350
	1. Hit the NEW key if this is a new prospect.		
	2. Hit the SEARCH key if this person has been here before.		
	3. Hit the CANCEL key if you want to start over.		
			GRT 9999

FIG. 34

INIT T:700;

PRINT 415 RECORDS - REPORT 022

STEP SEQ    SCRIPT TEXT

ANSWER

RUN 09/10/97 15:35:40 PAGE: 10

GOTO PUT DATA IN FIELD STEP SEQ

WO 99/14688

PCT/US98/19159

PR0 0030 I have one more question of you. It will help me understand your needs a little better. Which of the following items are most important to you in a vehicle?

Note: More than one answer may be selected. This screen will remain displayed until you hit 'NEXT/MORE'.

Safety  
Performance/Mech  
Reliability  
Next/More Choices

PRO 0031 Note: You have NINE choices. You may look through all of the choices by using the 'Next' or 'Previous' buttons to move back and forth between the screens.

Interior Room  
Economy  
Comfort/Convenience  
Next/More Choices

PRO 0032 Note: When you are done with your selections, hit 'Done'. Else hit 'Previous' for more choices.

Style  
Off-Road  
Snow  
Done

PRO 9999

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CLNT TST002	PRINT 415 RECORDS - REPORT 022	ANSWER	GOTO PUT DATA IN FIELD	STEP SEQ
STEP SEQ	SCRIPT TEXT			
SEL 0010	Note: What is our next step in SELECTING a vehicle?			
	1. Enter the stock number for the vehicle we've chosen.	1. Enter Stock!	SEL 0020	
	2. I have a vehicle in mind to show, and want to see if it is available.	2. Check Vehicle	SEL 0030	
	3. Use Vehicle Search to select a vehicle.	3. Vehicle Search	SEL 0040	
SEL 0020	Enter the STOCK! of the vehicle. It is displayed on the upper right hand corner of the BAR code sticker on the windshield. The system will accept the STOCK! when you hit CONTINUE if the vehicle is available for sale.	Continue	SEL 9999 Y	UNIT1STOCKNO
SEL 0030	Walk over to the vehicle you have in mind, and enter the STOCK!. The system will accept the STOCK! if the vehicle is available.	Continue	SEL 9999 Y	UNIT1STOCKNO
SEL 0040	1. When you hit CONTINUE, the Vehicle Search screen will be displayed. The entries you have made regarding the prospect's wants should already be on the screen. 2. You may make further entries or you may hit SEARCH. 3. After you select the vehicle you want, click on the PRO button to begin the Product Presentation.		SEL 9999 Y	

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STEP SEQ	SCRIPT TEXT	ANSWER	GOTO PUT DATA	IN FIELD	STEP SEQ
TRA 0005	Before we go in...	Continue			TRA 0010
TRA 0010	May we make you an offer on your trade-in?	Yes	YES	BUYERMISCI	TRA 0040
		No	NO	BUYERMISCI	TRA 0020
		Not Sure	NOT SURE	BUYERMISCI	TRA 0020
TRA 0020	Naturally you are not required to accept our offer if you don't think it's fair, but at least you will get an idea of what DEALERS WILL PAY for your vehicle in the Houston market. Also, don't forget that applying your trade against the purchase price of the vehicle saves you money in TAXES.	Okay			TRA 0040
		No			TRA 0030
TRA 0030	I understand your feelings. Let's get you the figures on your new car. Right this way.	Continue			TRA 9999
TRA 0040	Let me collect some data about your vehicle and then tell you what the Used Vehicle Buyer is going to look at when he evaluates your trade.	Continue			TRA 0010
TRA 0050	What is the LICENSE plate number?	Continue	TX	TRADESTATE	TRA 0051
				TRADELICENSE	
TRA 0051	What is the LICENSE STATE?	Continue			TRA 0060
TRA 0060	What is the ODOMETER?	Continue	AT	TRADETRANS	TRA 0070
				TRADEMILEAGE	
TRA 0070	Is this an automatic?	Continue			TRA 0080
TRA 0080	What COLOR is it?	Continue			TRA 0100
TRA 0100	Enter the VIN:	Continue			TRA 0110
				TRADEVINUM	

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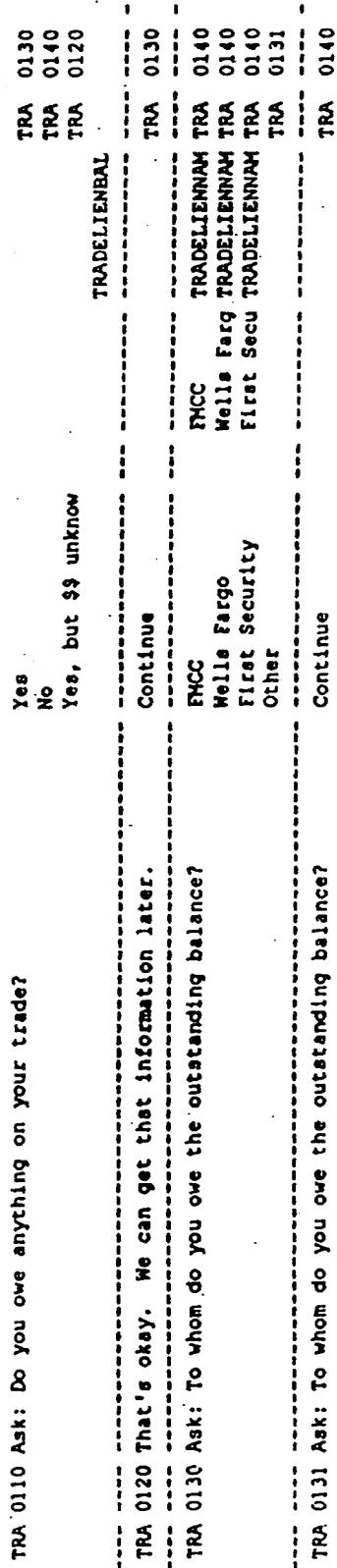


FIG. 38

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CLNT TST002	PRINT 415 RECORDS - REPORT 022	STEP SEQ	SCRIPT TEXT	ANSWER	GOTO PUT DATA	IN FIELD	STEP SEQ
							TRADELINEAM
							TRA 0150
							TRA 0160
							TRA 0170
							TRA 0180
							TRA 0190
							TRA 0200
							TRA 0240
							TRA 0240
							TRA 0240

FIG. 39

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	TRA	0240	TRA	0240
TRA	0240	Okay, that'll do it.	TRA	0250
		Continue		Continue
TRA	0250	I will turn in your vehicle information to our Used Vehicle Buyer and he will give us the Houston market value in the car. Will you loan me the keys for a few minutes?	TRA	9999 Y

FIG. 40

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PRINT 415 RECORDS - REPORT 022		RUN 09/10/97 15:35:40	PAGE= 14
STEP SEQ	SCRIPT TEXT	ANSWER	GOTO PUT DATA IN FIELD STEP SEQ
U01 00002			
U01 0010 Let's walk this way. Back here in service we have six SERVICE ADVISORS with a combined total of over 75 years experience in the dealership service industry. The plaques you see outside each one's office are for the customer service awards they've won.	Continue	U01 0020	
U01 0020 Every person who works in this dealership takes an annual course on what we call the CUSTOMER-FOR-LIFE philosophy. Have you heard of it?	Yes No	U01 0025 U01 0030	
U01 0025 Well then you already know that....	Continue	U01 0030	
U01 0030 The CUSTOMER-FOR-LIFE philosophy means we don't just sell you one vehicle and then never see you again. We want to follow up to make sure you are satisfied with the vehicle and with every single service experience you have at ABC Motors. We try to build a relationship with you, so that you will want to come back to us.	Continue	U01 0045	
U01 0045 This is our LUBE, OIL, FILTER center. We reconstructed it last year and have a 27 minute guarantee on getting you in and out, or your LOF is free. As you can see, you can also view the activities of the LOF center from the customer lounge.	Continue	U01 0050	
U01 0050 Here is our CUSTOMER LOUNGE. As you see, it is equipped with free telephones, fax machine, coffee, and morning snacks for your use if you choose to wait for your vehicle while it is serviced.	Continue	U01 0060	
U01 0060 We also have a SHUTTLE SERVICE in the mornings so you can drop your vehicle off and then go to work without waiting on your vehicle.	Continue	U01 0070	
U01 0070 This is our CASHIER.	Continue	U01 0080	
U01 0080 Let's go through this door to get to the front area. Now	Continue	U01 0090	
	down this hallway is the picture of the dealership back in		

FIG. 41

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In 1955. We also post some of the nice letters customers  
have written us on our WALL OF FAME.  
Now let's go get you those figures.

U01 0090 The water fountain and the restrooms are down that hall      Continue  
If you need them. May I offer you a coke?

U01 9999 Y

FIG. 42

PRINT 415 RECORDS - REPORT 022

STAFF :EQ :SCRIPT TEXT

101. 0100 Why buy from ABC Motors?

ANSWER

GOTO PUT DATA

IN FIELD

STEP SEQ

PAGE - 15

Dealer

Inventory

Parts and Service

Rental

U02 0020

U02 0200

U02 0400

U02 0500

101. 0100 One of the following reasons for buying at ABC Motors, "Dealer Stories"

"No Problem" Philo

Mission Statement

"I Ford Volume

More

U02 0030 Y

U02 0040 Y

U02 0050 Y

U02 0021

101. 0101 Choose one of the following reasons for buying at ABC Motors (cont'd). "Dealer Stories"

Top 100 Club

"I Jeep Volume

Eagles Club

More

U02 0060 Y

U02 0070 Y

U02 0080 Y

U02 0022

101. 0101 Choose one of the following reasons for buying at ABC Motors (cont'd). "Dealer Stories"

Top Hyundai Volume

Customer Loaners

Main Menu

End

U02 0090 Y

U02 0100 Y

U02 0010

U02 9999

101. 0101 "No Problem" Philosophy:

For over 40 years, ABC Motors has had one simple goal, to exceed our customers' expectations. Our "No Problem" Philosophy means that we always look for a way to ensure that this goal is met. Our mission statement is on a card that we all carry. It was developed and approved by the very own employees that we have here at ABC Motors.

U02 0040

U02 0020

U02 0010

U02 9999

101. 0141 Mission Statement:

We at ABC Motors are fully committed to providing an automotive experience that exceeds our customers' expectations.

U02 0045

U02 0050

U02 0020

U02 0010

U02 9999

RUN 09/10/97 15:35:40

PAGE - 15

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FIG. 43

Mr. Ford: First Volume: We know we've been successful because....  
More  
Previous Menu  
Main Menu  
End

U02 0060  
U02 0020  
U02 0010  
U02 9999

Mr. Top 100 Club: We know we've been successful because....  
More  
Previous Menu  
Main Menu  
End

U02 0070  
U02 0030  
U02 0010  
U02 9999

Mr. Top 100 Club: We're also a member of the prestigious Top 100 Club, a  
national award from Ford for dealers who combine  
outstanding volume with outstanding customer satisfaction.

FIG. 44

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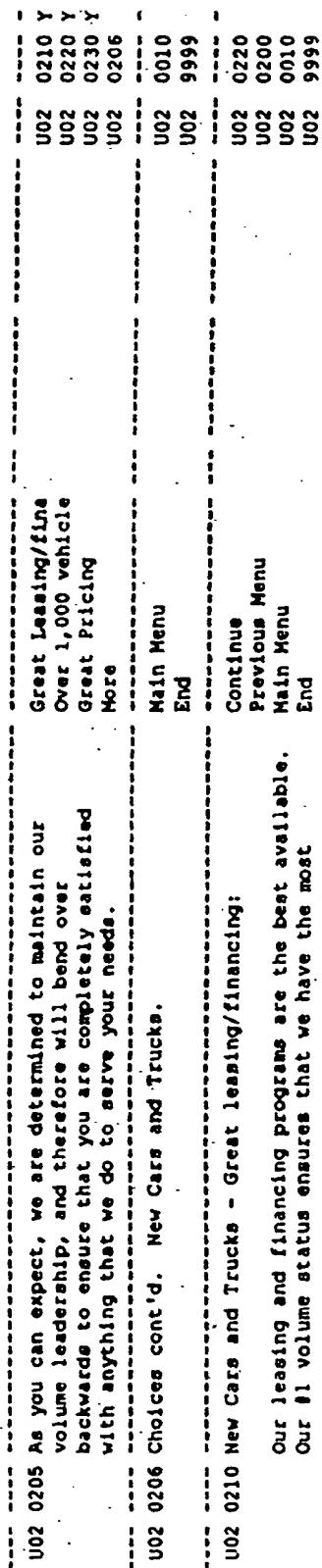


FIG. 45

STEP SEQ	SCRIPT TEXT	ANSWER	GOTO PUT DATA	IN FIELD	STEP SEQ
U02 0070 01	Jeep Volume: We know we've been successful because.... More Previous Menu Main Menu End				U02 0080 U02 0020 U02 0010 U02 9999
U02 0080	Eagles Club: We know we've been successful because.... More Previous Menu Main Menu End				U02 0090 U02 0020 U02 0010 U02 9999
U02 0090	Top Hyundai Volume: We know we've been successful because.. More We are also a top Hyundai dealership with excellent satisfaction scores. More Previous Menu Main Menu End				U02 0100 U02 0020 U02 0010 U02 9999
U02 0100	Customer Loaners: We know we've been successful because.... Our Service Department is also top-notch. In addition to top caliber technicians and equipment, we also have our Customer Loaner Program available for a small fee. This exclusive program, available only at ABC Motors,	Continue			U02 0105
U02 0105	Customer Loaners: (cont'd) provides a free rental car any time that your vehicle is in for repairs -or- maintenance, as well as giving you free TX state inspection.				U02 0110 U02 0020 U02 0010 U02 9999
U02 0110	We look forward to welcoming you into our family of completely satisfied customers. We are #1 for a lot of very good reasons. Experience the ABC Motors difference.	Continue			U02 0200 U02 0020 U02 0010 U02 9999
U02 0200	Choose one of the following categories for buying at ABC Motors. "Inventory Stories" New Cars and Truck Used Cars and Truck Main Menu End				U02 0205 U02 0300 U02 0010 U02 9999

STEP SEQ	SCRIPT TEXT	ANSWER	GOTO DATA	IN FIELD	STEP SEQ
	competitive programs available for our customers.	Continue Previous Menu Main Menu End	U02 0230 U02 0200 U02 0010 U02 9999		
U02 0220	New Cars and Trucks - Over 1,000 vehicles:	Continue Previous Menu Main Menu End	U02 0230 U02 0200 U02 0010 U02 9999		
	Being the largest also means that our selection of new cars and trucks is the best around. At any point in time, we have over 1,000 new vehicles available for you to select from... this means the right vehicle for you, ready to take home with you today.	Continue Previous Menu Main Menu End	U02 0230 U02 0200 U02 0010 U02 9999		
U02 0230	New Cars and Trucks - Great Pricing:	Continue Previous Menu Main Menu End	U02 0240 U02 0200 U02 0010 U02 9999		
	And, of course, no one can sell as many cars and trucks as we do, without having great pricing. This combination of price and selection is just not available anywhere else in the region.	Continue Previous Menu Main Menu End	U02 0240 U02 0200 U02 0010 U02 9999		
U02 0240	ABC Motors is, therefore, the only place to buy your new car or truck. Be part of our family of completely satisfied new vehicle owners.	Continue Previous Menu Main Menu End	U02 0300 U02 0200 U02 0010 U02 9999		
U02 0300	At ABC Motors, our reputation is at stake every time we sell a used car or truck. For years our customers have come to us expecting the finest in sales and service, and we've gone to extraordinary measures to ensure that every vehicle on the lot meets their expectations.	200 to choose from Proud to sell Thorough reconditioned More	U02 0310 Y U02 0320 Y U02 0330 Y U02 0301		
U02 0301	More choices (cont'd). Used Cars and Trucks.	3 Month / 3,000 Mi Financed on the Spot Main Menu End	U02 0340 Y U02 0350 Y U02 0010 U02 9999		
U02 0310	Used Cars and Trucks - 200 to choose from: We usually carry at least \$1 million in late model, low mileage vehicles. This represents around 200 premium cars and trucks at any one time. Since we sell more new Ford's and new Jeep's than anyone else in the Texas region, and	Continue Previous Menu Main Menu End	U02 0320 U02 0300 U02 0010 U02 9999		

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are a top Hyundai dealership as well, we have our pick of a huge volume of vehicles for resale on our lot.

U02 0320 Used Cars and Trucks - Proud to sell:

This also means that we can be very choosy about what we offer, and we are. Any vehicles that we wouldn't be proud to sell, we simply sell to the wholesalers, who then re-sell to other lots.

U02 0330 Used Cars and Trucks - Thoroughly reconditioned:

We thoroughly recondition AND clean every hand-picked used

-----  
Continue      Previous Menu      Main Menu      End  
-----

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[Continue](#)      [Previous Menu](#)      [Main Menu](#)

**SUBSTITUTE SHEET (RULE 26)**

FIG. 48

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CLNT TST002	PRINT 415 RECORDS - REPORT 022	STEP SEQ	SCRIPT TEXT	ANSWER	GOTO PUT DATA	IN FIELD	STEP SEQ
			car and truck that we sell, following an extensive mechanical, electrical, and cosmetic checklist.	End			U02 9999
		U02 0340 Used Cars and Trucks - 3 month / 3,000 miles:	Each used vehicle is backed by a 3 month / 3,000 mile guarantee. Since our vehicles are so good, extended service plans are available for even longer periods of time.	Continue Previous Menu Main Menu End			U02 0350 U02 0300 U02 0010 U02 9999
		U02 0350 Used Cars and Trucks - Financing on the spot:	Financing is available right on the spot at very competitive terms, and we even have great lease programs if you want the lowest payment possible.	Continue Previous Menu Main Menu End			U02 0360 U02 0300 U02 0010 U02 9999
		U02 0360 If you are thinking of a quality pre-owned vehicle, see what impressive quality really means in a used car or truck. We look forward to welcoming you into our family of completely satisfied customers. We are #1 for a lot of very good reasons. Experience the McCafferty difference.		Continue Previous Menu Main Menu End			U02 0400 U02 0300 U02 0010 U02 9999
		U02 0400 Choose one of the following reasons for buying at ABC Motors.	Service and Parts:	Convenient Personal Advisor State-of-the-art More			U02 0410 Y U02 0420 Y U02 0430 Y U02 0401
		U02 0401 Choose one of the following reasons for buying at ABC Motors.	Service and Parts: (cont'd)	Saves Money Accurate Repairs "Do it right" More			U02 0440 Y U02 0450 Y U02 0460 Y U02 0402
		U02 0402 Choose one of the following reasons for buying at ABC Motors.	Service and Parts: (cont'd)	Main Menu End			U02 0010 U02 9999
		U02 0410 Service and Parts - Convenient:	Continue				U02 0420

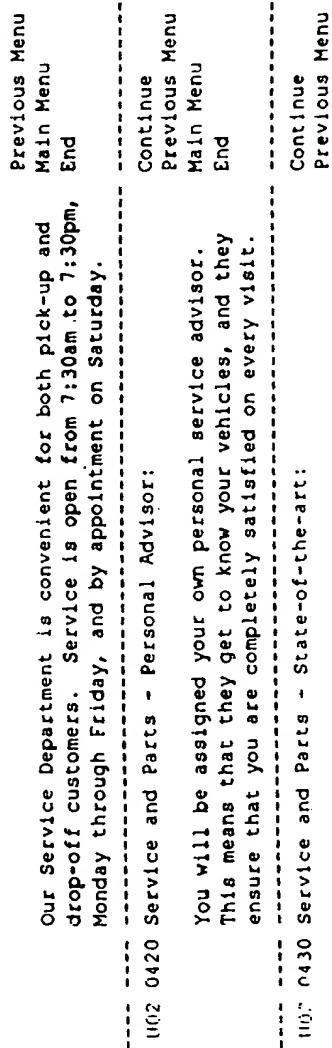


FIG. 50

## C:\INT\TS\W0U2 PRINT 415 RECORDS - REPORT 022

STEP SEQ	SCRIPT TEXT	ANSWER	GOTO PUT DATA	IN FIELD	STEP SEQ
	Our factory-trained technicians always work with the latest state-of-the-art equipment.	Main Menu End			U02 0010 U02 9999
U02 0440	Service and Parts - Saves Money:	Continue Previous Menu Main Menu End			U02 0450 U02 0400 U02 0010 U02 9999
U02 0450	Service and Parts - Accurate Repairs:	Continue Previous Menu Main Menu End			U02 0460 U02 0400 U02 0010 U02 9999
U02 0460	"Do it right":	Continue Previous Menu Main Menu End			U02 0470 U02 0400 U02 0010 U02 9999
U02 0470	We have over 40 service technicians and a HUGE inventory of parts available for every level of repair. This means prompt and accurate handling of any service needs that you have.				51 / 70
U02 0480	We look forward to your visit. We are devoted to your complete satisfaction.	Continue Previous Menu Main Menu End			U02 0500 U02 0400 U02 0010 U02 9999
U02 0490	Choose one of the following reasons for buying at ABC Motors.				U02 0510 Y U02 0520 Y U02 0530 Y U02 0501
U02 0500	Top Choice				U02 0540 Y U02 0010
U02 0510	Main Menu				

FIG. 51

We take our Rental Department very seriously. If your impression of dealership rental departments is that they aren't REALLY in the business, prepare for us to exceed your expectations.

U02 (510) Rental - 200 vehicles:

We offer a full range of over 200 Ford and Jeep/Eagle cars and trucks as well as specialty vehicles such as:  
• 4x4's • Luxury Conversion vans (TV's, VCR's)  
• Cargo vans • 15 Passenger vans  
• Convertibles

U02 9999  
End  
Continue

U02 0520  
0500  
0010  
9999

Previous Menu

Main Menu

End

FIG. 52

PRINT 415 RECORDS - REPORT 022		RUN 09/10/97 15:35:40	PAGE= 20	
STEP SEQ	SCRIPT TEXT	ANSWER	GOTO PUT DATA IN FIELD	STEP SEQ
U02 0520	Rental - Competitive Rates:	Continue Previous Menu Main Menu End		U02 0530 U02 0500 U02 0010 U02 9999
U02 0530	Rental - Convenient:	Continue Previous Menu Main Menu End		U02 0540 U02 0500 U02 0010 U02 9999
U02 0540	Rental - Top Choice:	Continue Previous Menu Main Menu End		U02 0550 U02 0500 U02 0010 U02 9999
U02 0550	We are dedicated to your complete satisfaction.	Previous Menu Main Menu End		U02 0500 U02 0010 U02 9999

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FIG. 53

CLNT TST002	PRINT 415 RECORDS - REPORT 022	ANSWER	GOTO PUT DATA	IN FIELD	STEP SEQ
STEP SEQ	SCRIPT TEXT				
WAN 1320	Do you mind if I ask you a few questions about your automotive needs?	Go ahead No Why?			WAN 1400 WAN 1330 WAN 1330 WAN 1340
	What we can do is pull out the questions together on this computer, then we'll have a better idea of what you want.	Not much time avail			
WAN 1330	I have found that by getting all of this down on the computer, I gain a better sense of your needs. Plus, we'll easily be able to pull it back up should you return to us or call back at a later date. So, will it be all right if I ask you a few questions?	Yes No			WAN 1400 WAN 1350
WAN 1340	I have found that by better learning what your needs are, we can SAVE YOU TIME in finding the perfect vehicle. Plus, by making note of your needs, you won't have to spend time re-explaining what you want when you call or return at a later date. So will it be all right if I ask a few questions?	Yes No			WAN 1400 WAN 1350
WAN 1350	That's fine. I respect your wishes.	Yes No			SEL 9999 WAN 1380
	Do you have any questions that I can answer?				
WAN 1360	Well, my name is... If you need any assistance I'll be standing out in front of the showroom, please don't hesitate to call out to me. Also, here's my card if you decide you have questions about our inventory when you get home.	Continue			SEL 9999
		BEB			
WAN 1400	Do you already have a particular vehicle in mind?	Right here Yes No			WAN 1405 WAN 1450 WAN 1450
WAN 1405	Great, let me enter the stock number and vehicle information.	Continue			WAN 1410
WAN 1410	Is the vehicle new or used?	New			UNIT1STOCKNO N WANTNEWUSED WAN 1415

FIG. 54

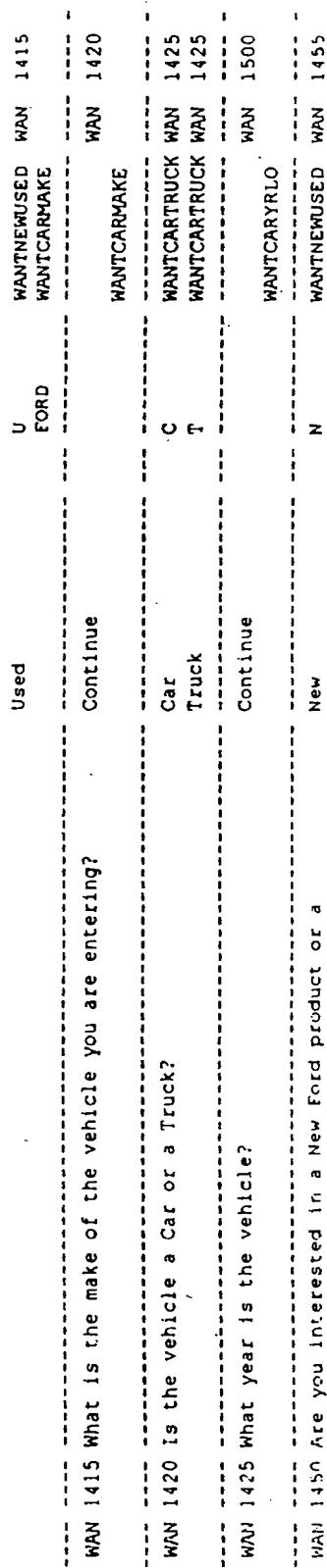


FIG. 55

CLNT TST002	PRINT 415 RECORDS - REPORT 022	ANSWER	GOTO PUT DATA	IN FIELD	STEP SEQ	PAGE=
STEP SEQ	SCRIPT TEXT					22
	Pre-Owned vehicle?	Used Haven't decided	U FORD		WANTNEWUSED WANTNEWUSED WANTCARMAKE	1455 1455
WAN 1455	Are you looking for a car, truck, sports utility vehicle, or minivan/van?	Car Truck Sports Utility Van	C T T T		WANTCARTRUCK WANTCARTRUCK WANTCARTRUCK WANTCARTRUCK WANTATVEHICAR WANTATVEHUP WANTATVEHSET WANTATVEHVN	1460 1460 1460 1460 1460 1460 1460 1460
WAN 1460	Do you have a particular MAKE in mind?	Yes No				WAN 1465 WAN 1475
WAN 1465	What YEAR vehicle are you looking for? Enter "oldest" year acceptable:	Continue			WANTCARYRLO	56 / 70
WAN 1470	Do you have a particular MODEL in mind?	Continue			WANTCARMODEL	1480
WAN 1475	Do you prefer a particular BODY STYLE?	Yes No			WANTCARBODY	1480 1480
WAN 1480	What is the oldest vehicle YEAR model you will purchase?	Continue			WANTCARYRLO	1490
WAN 1490	What is the newest YEAR model you prefer?	Continue			WANTCARYRHI	1500
WAN 1500	What MAKE of vehicle do you currently drive?	Continue	TRA	TRADEMAKE		1520
WAN 1520	And what is the MODEL of the vehicle you currently	Continue				1550

FIG. 56

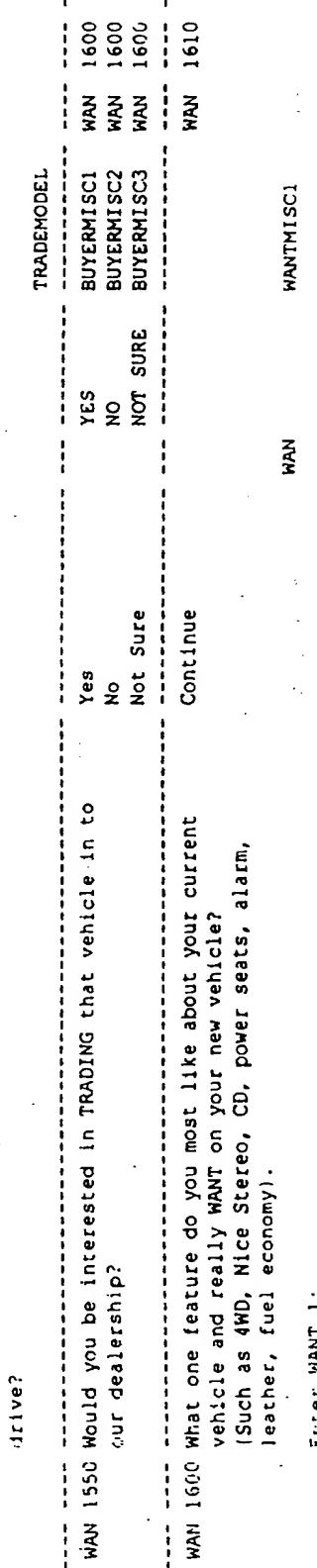


FIG. 57

CLNT TST002

PRINT 415 RECORDS - REPORT 022

RUN 09/10/97 15:35:40 PAGE= 23  
WO 99/14688  
PCT/US98/19159

STEP SEQ SCRIPT TEXT

ANSWER

GOTO PUT DATA

IN FIELD

STEP SEQ \*

WAN 1610 What second feature do you most like about your current vehicle? and really WANT on your new vehicle? (Such as 4WD, Nice Stereo, CD, power seats, alarm, leather, fuel economy).  
WANTMISC2

Enter WANT 2:

WAN 1620 What one feature have you never had but really want to have on your new vehicle?

Enter WANT 3:

WAN 1730 Will this vehicle be for personal use or business use?

Personal  
Business

N  
Y

WAN 1620

Continue

WAN 1730

Continue

WAN 1740

What line of business are you in?

Why?

WAN 1741

It's helpful to know if you'll be making deliveries such as flowers, or making purchases such as antiques, or sell a product which need you need to carry around, or carry clients to business appointments, or to work a ranch.

WAN 1800 Have you set your MONTHLY budget yet?

Yes  
Don't know

WAN 1810

Do any of these monthly figures come close to what you had in mind?

WAN 1820

More Choices

WAN 1830

Write in your budgeted monthly payment.

WAN 1840

BUDGET

BUDGET

WAN 1850

WAN 1860

FIG. 58

WAN 184) That's okay. I can help you figure that out later if you like.

WAN 190) Last question, do you have a color preference?

WAN 200) Based on the information you've provided me, I have a vehicle (or several vehicles) in mind which I believe will meet your needs.

Continue

Continue

Continue

WAN 190)

WAN 200)

WAITCARCOLOR

59

/ 70

FIG. 59

C:\NT\TST\002 PRINT 415 RECORDS - REPORT 022

STEP SEQ	SCRIPT TEXT	RUN 09/10/97 15:35:40 PAGE= 24
ANSWER	GOTO PUT DATA IN FIELD	STEP SEQ
WRI 0010	After seating your prospects, offer them some refreshments if you haven't already done so.	Continue
WRI 0011	Folks, can I get you a refreshment? How about some coffee or a coke?	
WRI 0012	Read through the following screens as a refresher of what to do next, then hit HIDE SCRIPT and turn the computer so you both can see the screen. Use the Prospect Offer screen to enter the info.	OFF
WRI 0013	Okay, let's enter the numbers in the computer. The selling price is _____. The Houston area market value on your trade-in is _____. With \$1000 down, let's see what your payment will be. You will now have to hit SUBMIT OFFER. We'll have to wait a moment while the computer calculates the payment.	Continue
WRI 0014	Okay, the vehicle is available, and the payments are calculated.	Why is Lease so lo Prefer Financing Prefer Leasing
	For a 48 month note, your payment would be _____. For a 24 month lease, your payment would be _____. Which do you prefer?	
WRI 0015	Ford is able to offer such a low lease payment because you are only paying for the portion of the vehicle you are using. We take the price of the vehicle today and subtract the guaranteed value of the vehicle at the end of the lease. This is the amount of the vehicle you are "using", and we finance this over a 24 or 36 month period.	Interested in Leas Prefer Financing Prefer Leasing
WRI 0016	Click on the quote the prospect is most interested in.	Continue
WRI 0017	All we need is your OK right here and we can get the paperwork started.	Continue
	Note: Now be SILENT. Give the customer the pen and indicate the SUBMIT OFFER button. Wait for the customer to respond first. About 10% of your customers will sign on the first offer. Don't blow it by talking.	

60 / 70

FIG. 60

WRI 0110 Note: Hit HIDE SCRIPT now. Hit SHOW SCRIPT when you are ready to see the script again. Hit PREVIOUS if you'd like to go back to one of the previous scripts.

WRI 0200 Prospects objects to one or more of the following:

Price  
Terms (Rate)  
Trade Allowance  
More

WRI 0210 Prospects objects to one or more of the following: (cont'd)

Payment  
Money Down  
More

WRI 1000  
WRI 0200

OK  
Objections

WRI 0300  
WRI 0400  
WRI 0500  
WRI 0210

WRI 0600  
WRI 0700  
WRI 0200

FIG. 61

STEP SEQ	SCRIPT TEXT	ANSWER	GOTO PUT DATA	IN FIELD	STEP SEQ
WRI 0220	Prospects objects to one or more of the following: (cont'd)	Not sure Not buying today Spouse not here Need time to think			WRI 0600 WRI 0810 WRI 0820 WRI 0830
WRI 0300	We believe we offer our vehicles for a fair, already discounted price. What price did you have in mind?	Continue			WRI 0310
WRI 0310	Note: Hit HIDE SCRIPT and SUBMIT OFFER.			UNITSELL	
WRI 0320	All we need is your OK right here and we can get the paperwork started.	OK More Objections			WRI 0320 WRI 0330
WRI 0330	Note: Now be SILENT. Give the customer the pen and indicate the SUBMIT OFFER button. Wait for the customer to respond first.				WRI 1000 WRI 0230
WRI 0400	Mgmt has responded with a counter-offer. All we need is your OK right here and we can get the paperwork started.	OK More Objections			WRI 1000 WRI 0200
WRI 0410	Note: Hit HIDE SCRIPT, change the term, and hit SUBMIT OFFER. You will then need to wait for the desk to respond.	Continue			WRI 9999
WRI 0430	Of course, this rate is based on an average person's credit history. We can check your history now to determine if your credit will get you a better rate or to see if you qualify for any special financing. We can also increase the term (months) to bring the payment down.				WRI 0410 WRI 0430
WRI 0440	Note: Hit the CBI step button now to begin gathering data for the credit history check. Hit the WRI step button when you are ready to return to the write-up.				WRI 0440 WRI 0450
WRI 0450	Note: Hit HIDE SCRIPT, change the term, and hit SUBMIT OFFER. You will then need to wait for the desk to respond.				Mgmt accepts term Mgmt counter-offer

WRI 0440 The computer has generated the new pmt. All we need is OK your OK right here and we can get the paperwork started.  
Note: Now be SILENT. Give the customer the pen and indicate the SUBMIT OFFER button. Wait for the customer to respond first.

WRI 0450 Mgmt has responded with a counter-offer. All we need is OK your OK right here and we can get the paperwork started.  
Note: Now be SILENT. Give the customer the pen and indicate the SUBMIT OFFER button. Wait for the customer to respond first.

WRI 0510 Of course, the trade value is based on the Houston market's Maintenance record

WRI 1000  
WRI 0200

WRI 1000  
WRI 0200

WRI 1000  
WRI 0200

WRI 0510

FIG. 63

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WO 99/14688 PCT/US98/19159

STEP SEQ	SCRIPT TEXT	ANSWER	GOTO PUT DATA	IN FIELD	STEP SEQ
	demand for the vehicle and the condition of the vehicle. Can you tell me anything about the vehicle which I can pass on to the Used Vehicle Buyer to increase it's value? For example, can you provide us the maintenance records or allow the next owner to call you with questions about the vehicle?	Allow phone calls Both Just wants more \$\$			WRI 0520 WRI 0530 WRI 0540
WRI 0510	Call the Used Vehicle Buyer. Tell him (with the customer present): My customer here is willing to provide us with maintenance records that indicate regular maintenance was performed on this vehicle. Will you allow him more money for his trade-in?	Continue			WRI 0570
WRI 0520	Call the Used Vehicle Buyer. Tell him (with the customer present): My customer here is willing to allow us to give the next customer his name and phone number to call if he has any questions. Will you allow him more money for his trade-in?	Continue			WRI 0570
WRI 0530	Call the Used Vehicle Buyer. Tell him (with the customer present): My customer here is willing to provide us with maintenance records that indicate regular maintenance was performed on this vehicle. And he is willing to allow us to give the next customer his name and phone number to call if he has any questions. Will you allow him more money for his trade-in?	Continue			WRI 0570
WRI 0540	How much more money do you think you need for your vehicle?	<\$500 >\$500			WRI 0550 WRI 0580
WRI 0550	Call the Used Vehicle Buyer. Tell him (with the customer present): My customer doesn't have the maintenance records nor does he want a stranger calling him with questions about his old vehicle. However, he really believes his car is worth a few hundred dollars more. Is there anything you can do for him? Do you mind taking another look at the vehicle with the customer present?	Re-evaluate trade More money No more money			WRI 0560 WRI 0570 WRI 0580

FIG. 64

WRI 0560 • If the buyer is available, say: Let's walk out to see the Available Used Vehicle Buyer now and we'll re-evaluate your trade-in:  
• If the buyer is not available, say: The Buyer isn't available now. Let's proceed with the credit process while we wait.

WRI 0570 Well, it looks like we can give you \$ \_\_\_\_ for your trade. Yes  
Is this acceptable to you?

WRI 0580 Well, it sounds as if you will have better luck with this vehicle selling it yourself, if you don't mind dealing with strangers or taking the chance of not selling it.

WRI 0590 TRADEGROSS  
WRI 0590 TRADEGROSS  
WRI 0590 TRADEGROSS  
WRI 0590 TRADEGROSS

FIG. 65

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CNT TEST002	STEP SEQ	SCRIPT TEXT	ANSWER	GOTO PUT DATA	IN FIELD	STEP SEQ
		immediately. You also have a cost associated with advertising the vehicle and you lose the tax benefit from applying the trade to the new vehicle sale price. Would you like to proceed without the trade?				
	WRI 0590	Note: Hit HIDE SCRIPT and SUBMIT OFFER.	Wgmt accepts offer			WRI 0591
	WRI 0595	All we need is your OK right here and we can get the paperwork started.	OK			WRI 1000
		Note: Now be SILENT. Give the customer the pen and indicate the SUBMIT OFFER button. Wait for the customer to respond first.	More objections			WRI 0200
	WRI 0600	Of course, there are several ways to decrease the payment. We can check your history now to determine if your credit will get you a better rate than the average rate we use as an example. We can also bump the term (months) up. You may also put more money down.	Better rate Bump term More money down Other			WRI 0410 WRI 0430 WRI 0700 WRI 0610
	WRI 0610	More choices:	Trade allowance Price			WRI 0500 WRI 0300
	WRI 0700	of course, how much money would you like to put down?	Continue			WRI 0310
	WRI 0800	Just not sure:	Don't like Something else Not sure/need time			WRI 0803 WRI 0200 WRI 0801
	WRI 0801	Many people just aren't 100% sure they are making the right move when they buy a new vehicle. Perhaps I can help you pinpoint what concerns you. Is there something about the vehicle you don't like? Or is it something else?	Continue			WRI 0802
		Just not sure:	Well, I can understand your concern. Let me get a brochure with our prices together, you can take it home with you, and you can call me if you have any questions. That way you can consider your purchase at your leisure.			

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FIG. 66



## PRINT 415 RECORDS - REPORT 022

STEP SEQ	SCRIPT TEXT	ANSWER	GOTO PUT DATA	IN FIELD	STEP SEQ
WRI 0805	Let's find a vehicle for you that you really want. Let me check my computer to see if we have something else that better suits the needs you've described to me.	Continue			WRI 0806
WRI 0806	It may be necessary to switch the prospect on to another vehicle at this point. If this is the case, go back to the SEL (select) step to help them find another vehicle. Hit the SEL button now.	Continue			WRI 9999
WRI 0810	Not buying today: I respect that you are not planning to buy today. However, let me ask you one question. Is there any single item that is preventing you from coming to a decision today? What is that item? If we can take care of that, will you consider buying?	Yes			WRI 0811
WRI 0811	Not buying today: (cont'd) You may need to hit the MANAGER button now for assistance. Or you may determine based on their answer that they absolutely won't be buying today. Or you may find that you can answer their objection yourself.	Continue			WRI 0812
WRI 0812	Not buying today: (cont'd) I'll respect your wishes. Let's make an appointment for you to come back in when you are closer to a decision. Would tomorrow or the next day be more convenient for you?	Continue			WRI 0822
WRI 0820	Spouse not here: I can certainly appreciate the fact that you would want your spouse involved in the decision. Allow me to gather all this information together for you so you can get on your way.	Continue			WRI 0821
WRI 0821	Spouse not here: Let's make an appointment for you and your spouse to return together. Would this evening or tomorrow be more convenient?	Continue			WRI 0822

WRI 0822 And what time would be best for you? 7pm? 7:30pm?  
WRI 0823 Continue  
WRI 0823 Now, you will call me if something changes on your end,  
WRI 0826 won't you? And I'll do the same for you if something  
WRI 0826 changes on my end. Where can I reach you or your  
WRI 0827 answering machine?  
WRI 0827 NO PHONE GIVEN  
WRI 0828 Continue  
WRI 0828 Work# also given  
WRI 0826 Continue  
WRI 0828 Continue  
WRI 0828

FIG. 69

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STEP SEQ	SCRIPT TEXT	ANSWER	GOTO PUT DATA IN FIELD STEP SEQ *
WRI 0827	Cell phone:	Cell# also given Continue Home# also given	WRI 0827 WRI 0828 WRI 0825
WRI 0828	Great, I'll see you then.	Continue	WRI 0829
WRI 0829	Note: Walk the prospect out, and if you aren't sure of their biggest obstacle to purchase, ask the following.... I'd like to ask one last question of you. When you go home to think about this decision, what will be your biggest concern? Perhaps I'll be able to think of a way to address it before you return.	Continue	WRI 9999
WRI 0830	Need time to think:	OK - ready to sign Still need time More objections Continue	WRI 1000 WRI 0840 WRI 0200
WRI 0840	Still need more time: (cont'd) I'll respect your wishes. Let's make an appointment for you to come back in when you are closer to a decision. Would tomorrow or the next day be more convenient for you?	Take all the time you need. Why don't I leave you alone for a moment to process everything. Can I get you anything while I'm up?	WRI 0822
WRI 1000	Note: Congratulations on completing the write-up step. The next step is the credit application process.	APPTDATE Continue	WRI 9999

PRINT ENDED AT: 15:36:05

FIG. 70



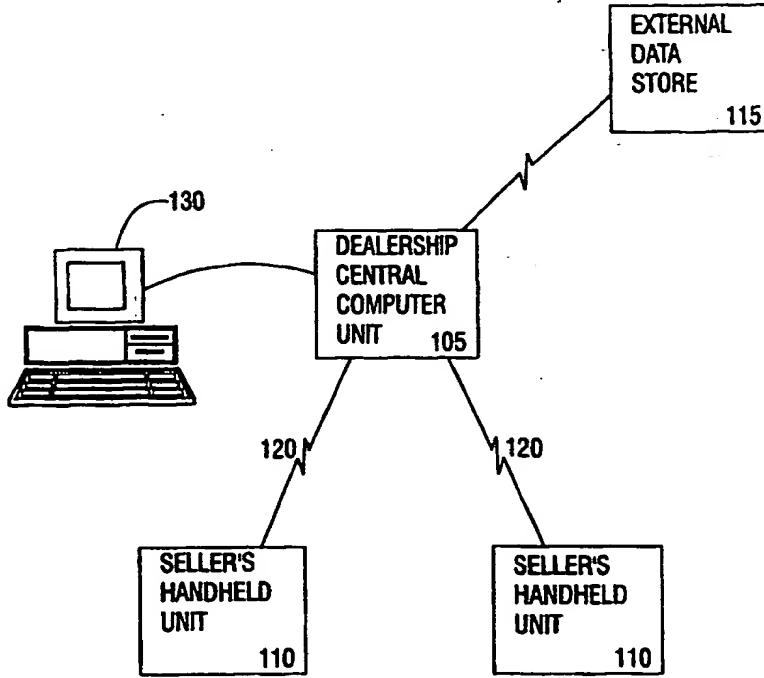
## INTERNATIONAL APPLICATION PUBLISHED UNDER THE PATENT COOPERATION TREATY (PCT)

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(71) Applicant (for all designated States except US): ROSEFAIRE DEVELOPMENT LTD. [-]; 33 Church Street, Hamilton (BM).		
(72) Inventors; and		<b>Published</b>
(75) Inventors/Applicants (for US only): BROCKMAN, Robert, T. [US/US]; 903 Oak Valley, Houston, TX 77024 (US). JONES, Donald, D. [-]; Suite 235, 8 South Shore Road, Smiths, FL 05 (BM).		With international search report. Before the expiration of the time limit for amending the claims and to be republished in the event of the receipt of amendments.
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(54) Title: PORTABLE SALES PRESENTATION SYSTEM WITH SELECTIVE SCRIPTED SELLER PROMPTS

## (57) Abstract

A handheld computer unit for use by, e.g., a car sales person (seller) prompts the seller with a standard script to be followed at each step in the process after a prospect enters a dealership. The prospect's response to the scripted questions is used to identify the prospect's particular interests of a general nature, e.g., safety, and of a specific nature, e.g., trailer towing capacity. When either a general or specific interest is identified, the seller is prompted to tailor the conversation to address the prospect's interests. Among other things, the handheld unit can perform functions such as (i) permitting the seller to retrieve useful information such as inventory availability from a sales information data store; (ii) displaying option-sensitive prompts to aid the seller in discussing specific vehicles under consideration; (iii) accessing remote communications links to external data sources to obtain information on credit-worthiness of the prospect, financing terms, and availability; (iv) displaying motivational information such as the percentage likelihood of consummating the sale successfully; (v) providing a communications link with management personnel.



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# INTERNATIONAL SEARCH REPORT

International Application No

PCT/US 98/19159

**A. CLASSIFICATION OF SUBJECT MATTER**  
IPC 6 G06F17/60

According to International Patent Classification (IPC) or to both national classification and IPC

**B. FIELDS SEARCHED**

Minimum documentation searched (classification system followed by classification symbols)

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Documentation searched other than minimum documentation to the extent that such documents are included in the fields searched

Electronic data base consulted during the international search (name of data base and, where practical, search terms used)

**C. DOCUMENTS CONSIDERED TO BE RELEVANT**

Category	Citation of document, with indication, where appropriate, of the relevant passages	Relevant to claim No.
X	WO 97 26610 A (BLAND PARTNERSHIP ; BROCKMAN ROBERT T (US); JONES DONALD D (US)) 24 July 1997 see abstract; claims 1-36; figure 1 see page 1, line 3 - page 14, line 25 ---	1-47
A	US 5 493 490 A (JOHNSON JEROME D) 20 February 1996 see abstract; claims 1-32; figures 1-4, 6-11, 22 see column 1, line 16 - column 39, line 50 ---	1-47
A	CAMPANELLI M: "SOUND THE ALARM" SALES AND MARKETING MANAGEMENT, no. PART 02, December 1994, pages 20-22, 24/25, XP002034775 see the whole document ---	1-47

Further documents are listed in the continuation of box C.

Patent family members are listed in annex.

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European Patent Office, P.B. 5818 Patentlaan 2  
NL - 2280 HV Rijswijk  
Tel: (+31-70) 340-2040, Tx. 31 651 epo nl.  
Fax: (+31-70) 340-3016

Authorized officer

Gardiner, A

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## C.(Continuation) DOCUMENTS CONSIDERED TO BE RELEVANT

Category	Citation of document, with indication, where appropriate, of the relevant passages	Relevant to claim No.
A	US 5 576 951 A (LOCKWOOD LAWRENCE B) 19 November 1996 see abstract; figures 1,6-9,14 see column 1, line 31 - column 23, line 41 -----	1-47

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Information on patent family members

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